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ACADEMIC LIBRARY DIRECTORS' PERCEPTIONS
OF JOINING A LARGE LIBRARY CONSORTIUM SHARING AN INTEGRATED
LIBRARY SYSTEM: A DESCRIPTIVE SURVEY

by

Dennis E. Krieb

A DISSERTATION

Presented to the Faculty of
The Graduate College at the University of Nebraska
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Major: Educational Studies
(Educational Leadership and Higher Education)

Under the Supervision of Professor Brent D. Cejda

Lincoln, Nebraska

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ACADEMIC LIBRARY DIRECTORS' PERCEPTIONS
OF JOINING A LARGE LIBRARY CONSORTIUM SHARING AN INTEGRATED
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University of Nebraska, 2011

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The collective holdings of CARLI's (Consortium of Academic and Research Libraries in Illinois) "I-Share" catalog total approximately 32 million items. It is the third largest academic catalog in the United States, however only 76 of CARLI's 148 academic libraries participate in I-Share. This descriptive survey examined the factors that influenced a CARLI academic library director's decision to join, or not join, I-Share's integrated library system. Seventy-seven of the 145 CARLI library directors sampled completed the web-based survey. This represented a 53.1% response rate.

The framework for the survey was designed around three sections; advantages, disadvantages, and obstacles to participating in I-Share. Directors were asked to select the level of importance of I-Share benefits, and their level of agreement to questions regarding the disadvantages and obstacles to participating in I-Share. These questions were based on a Likert scale and assigned numeric values. An independent samples t-test compared I-Share and non I-Share directors' responses by institution type and collectively. The difference in 11 of 12 comparisons was found to be statistically significant.

Through five open-ended questions, several themes were discovered. Benefits associated with resource sharing were consistently stated as being the most influential factor for I-Share member directors to participate in I-Share. Other important benefits mentioned were I-Share's value, centralized technical support, and the opportunity to collaborate closely with other libraries.

With non I-Share library directors, reasons not to join I-Share differed with institution types. For some community college library directors, the decision to remain with a local, multi-type library system was based upon the needs of their student populations. Among the reasons given by non I-Share library directors from independent - not for profit institutions was the preference to manage an integrated library system "in-house". The infrequency of I-Share open enrollment periods, and migration costs associated with unbundling records from a current ILS, were viewed by all survey respondents as being the most serious obstacles to I-Share participation.

Dedication

To my parents and wife.

Acknowledgements

“We are like dwarfs on the shoulders of giants so that we can see more than they, and things at a greater distance, not by virtue of any sharpness of sight on our part, or any physical distinction, but because we are carried high and raised up by their giant size.” - French philosopher Bernard of Chartres.

I too have been lifted by giants.

Had it not been for the sacrifices of my parents Dennis and Ruth Ann, my life would not be what it is today. Their unconditional love not only provided a strong foundation for my sister and me, but serves as a model I hope to carry through for my children Abigail and Gabrielle. For this I am eternally grateful.

My wife Rachel has also been remarkable. Her support has been unwavering, which has made my completion of this degree possible. Never did she complain during the countless nights when I was writing and reading alone. She is the most unselfish person I know and I consider myself incredibly fortunate to have her for my wife.

I also need to recognize CARLI Executive Director Susan Singleton and CARLI Director of Administration and Planning Tom Dorst for their assistance and feedback. Their help was instrumental in helping me refine and shape this dissertation. I thank them both for their support.

Lastly, I owe my thanks and gratitude to my advisor Dr. Brent Cejda. Frankly I am still astounded by his ability to successfully carry through his duties as an advisor at a distance, without the benefit of face-to-face interaction. In what can be a confusing journey, Dr. Cejda's leadership and personal attention allayed the stress I would begin to

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CHAPTER 1

INTRODUCTION

With the information revolution brought about by the development of the World Wide Web, libraries at every level have graduated from their traditional role as storehouses of information to vigorous disseminators of information. This is necessary given the changing information seeking habits and spiraling expectations of users. (Hiremath, 2001, p. 80)

According to Allen and Hirshon (1998), academic libraries are now in “collaborative survival mode”. The reason for this heightened status is the confluence of budgetary and technological pressures that have pushed libraries to cede institutional self-sufficiency in favor of confronting these forces with library partners (Allen & Hirshon, 1998). This move to coalesce and pool resources can be observed in the continued growth of library consortia since the 1990s (Pnina, 2003).

Among the budgetary forces being felt by academic libraries is the increased cost to maintain collections. Notwithstanding collections budgets for books increasing 82% since 1986, libraries have struggled to keep pace as costs have risen by nearly the same percent. The net result has been an increase of less than 1% annually for library book collections in twenty years (Kyrillidou & Young, 2008).

For periodicals, inflationary pressures have taken a more debilitating toll upon library budgets. Since 1986, serial subscriptions have spiked 321% (Kyrillidou & Young, 2008). This saltation in price being largely attributed to journals related to science and medicine. In 2007, the average annual price for a chemistry journal was \$3429. For a physics journal, the subscription price was \$2865 (Orsdel & Born, 2007).

Online periodicals have also encroached upon acquisitions budgets. These subscriptions have grown at a rate between two and ten times faster than other library

material (Kyrillidou & Young, 2008). Ironically the popularity of online periodicals among users has worked against libraries. As patrons demand more full-text articles online, publishers have been able leverage this popularity by imposing more stringent and expensive pricing models. One common practice of publishers has been “print-plus-online”. With this model libraries desiring to add online subscriptions are coerced through punitive pricing to keep their print subscriptions (Orsdel & Born, 2002, pg. 51). Thus many libraries must maintain their print collections to qualify for better online subscription costs. Collective brokering through library consortia has been successful in stanching this practice to some degree.

In this context of rising costs for academic libraries, college enrollments have also swelled. American postsecondary institutions have enjoyed a 45% increase in students over the last 30 years (United States Department of Education, 2008). This infusion has created more demand for library material while library purchasing power has been severely diminished. The collective impact of user demand and higher material costs has served to force libraries to rely more upon resource sharing with other libraries. Academic libraries are now borrowing three times more items on a per-student basis than they did 20 years ago (Kyrillidou & Young, 2008).

In terms of the influence of technology upon academic libraries to coalesce, participation in a consortium sharing a common integrated library system (ILS) is one strategy for reducing costs (Allen & Hirshon, 1998). Libraries partnering in these environments work together by sharing labor, technology and resources. The degree of benefit is often related to the consortium type. Consortia sharing a common ILS represent the highest cost-benefit potential:

While large centralized automation systems represent a significant capital investment, the resulting costs per library are much lower than what it would cost to implement its own stand-alone system. Costs for hardware, facilities, software licenses, technical support, and administrative overhead involved in a single central system can be significantly less than the offsetting costs involved in maintaining multiple independent systems. (Breeding, 2004, p. 37)

One example of labor sharing can be found in cataloging records. A librarian from one library can benefit from the work of a colleague by simply importing another library's bibliographic record without cost. This practice is commonly known as "copy cataloging". The alternative would require that a librarian either create a new record or import a record from a fee-based bibliographic utility – both of which represent a higher unit cost per record for the library than copy cataloging.

For the library user, a consortium's union catalog can represent an exponential gain in terms of access and delivery of library material. Many of these catalogs allow the patron to generate requests for books held by other libraries. This capability to initiate unmediated requests is commonly referred to as "patron-initiated borrowing". Patrons are also able to manage their library accounts online, checking the status of requested items and renewing those already checked-out without physically being in a library.

Delivery in consortia offering patron-initiated borrowing is often coordinated through a courier system, rather than traditional mail. The result is a much faster process for receiving books. Patrons using the Summit Catalog in the Orbis Cascade Alliance consortium receive requested materials within a few days as compared to three weeks with traditional mediated interlibrary loan using standard mail (Munson, 2006, p. 374).

Notwithstanding the advantages of participating in a consortium sharing an ILS, there are many academic libraries in Illinois that have chosen not to join the I-Share statewide consortium and pool their collections in the I-Share catalog. Some of these libraries have elected to remain independent, preferring to run their own ILS “in-house”. Others have opted to integrate their collections within their local multi-type library systems despite their smaller, less-academic focus. Currently 51% of eligible academic libraries in Illinois participate in I-Share’s catalog of 32 million items, the third largest consortial collection in the United States.

Purpose Statement

The purpose of this study was to describe the reasons why an academic library director has decided to join, or not join, a large academic library consortium sharing a common integrated library system.

Theoretical Framework

Creswell (1994) states that a theory can be used as a framework from which to craft research questions for data collection. For this study two theoretical models were used, Rogers’ (1995) Diffusion of Innovation Theory and Pfeffer and Salancik’s (1978) Resource Dependency Theory. Together, both served to provide a framework to better understand how technology represented by a shared ILS was viewed by academic library directors within a statewide library consortium.

Rogers (1995) describes an innovation as an idea, practice or object that is perceived as being new to any group or social system. Diffusion of innovation is a social process in which information about a new idea or technology is viewed subjectively and thus ultimately adopted or rejected through perceivable channels, times and modes. The

process of diffusion consists of five parts: knowledge, persuasion, decision, implementation, and confirmation (Rogers, 1995). The decision to adopt an innovation is expressed in three settings: decisions made independently by individuals within a social system, decisions made collectively by all members of a social system, and decisions made by a small group of influential members on behalf of an entire social system (Rogers, 1995).

The rate of adoption associated with an innovation normally follows an S-shaped curve. Initially, innovations receive a tepid response followed by an accelerated acceptance until roughly half of the respondents have adopted the innovation. The rate of adoption then slows as there are few remaining respondents left to adopt (Rogers, 1995).

Adopters of innovation are grouped into five classes: innovators, early adopters, early majority, late majority and laggards (Rogers, 1995). Innovators are regarded as being risk takers and are often considered to be the vanguard of those incorporating new innovations. Early adopters are defined as willing to take risks yet still heed caution before implementing new ideas and technologies. The early majority are willing to accept change after a varying degree of time and are usually the most numerous adopter category. The late majority adopt new ideas only after the average number of members of a social system have done so and approach innovation with a high degree of skepticism. Laggards comprise the last group to adopt innovation. This group is characterized by its reluctance to accept change in trends and technology (Rogers, 1995).

In terms of this study, respondent answers associated with the length of I-Share participation and future plans to join I-Share were compared with Rogers Diffusion Process Model (1995) regarding expected adoption rates for innovation. This theoretical

approach is grounded upon the presumption that I-Share membership represents a superior option for Illinois academic libraries in comparison to multi-type library systems and other consortia sharing an ILS.

Diffusion of Innovation Theory also contends that, “earlier adopters have larger units (farms, schools, companies, and so on) than later adopters” (Rogers, 1995, p. 269). In this study, respondent answers to questions regarding their length of I-Share membership and the Carnegie Classification of their parent institution were used to discern if those libraries that initially joined I-Share were from larger institutions as suggested in Rogers’ Diffusion of Innovation Theory.

Rogers’ Diffusion of Innovation Theory has been applied as a theoretical framework in previous research with technology adoption and libraries. A recent study by Guder (2009) on the incorporation of web-based communities for library outreach is a recent example. Other examples of library-related research using Rogers’ Diffusion of Innovation Theory include: the integration of social software for virtual reference services (Rutherford, 2008), perceptions of information professionals toward adopting communication technologies in libraries (Rabina & Walczyk, 2007), and the assimilation of information technology in sub-Saharan library education (Minishi-Majanja & Kiplang'at, 2005).

Resource Dependency Theory (Pfeffer & Salancik, 1978) suggests that all organizations must depend upon their environment for survival. This dependence represents a degree of uncertainty and loss of autonomy to the organization. To mitigate the effects of environmental dependence, organizations will seek interorganizational relationships through coalitions with similar interests and needs. “In social systems and

social interactions, interdependence exists whenever one actor does not entirely control all of the conditions necessary for the achievement of an action or for obtaining the outcome desired from the action” (Pfeffer & Salancik, 1978, p. 40). These relationships may evolve into behavioral dependencies that produce an increased coordination and control over each organization’s resources to further reduce the risk of environmental factors (Pfeffer & Salancik, 1978).

The application of Resource Dependency Theory in this study sought to discern if the responses given by CARLI directors regarding I-Share’s immense collection size and expedited delivery of requested material through a private courier were consistent with what would be expected from other organizations whose existence is leveraged upon the predictable availability of “important resources” as posited by Pfeffer and Salancik (1978).

Resource Dependency Theory has also been used in library research. Willett (1992) used this theory as a theoretical framework to study how public library directors in California attempted to control their environments after a tax limitation measure was passed in 1978.

Context Statement

Illinois has a total of 192 colleges and universities accredited by the Illinois Board of Higher Education (IBHE, 2009). Collectively these libraries hold more than 47 million volumes representing 16.5% of all academic library collections in the United States (Illinois Library Association, 2004). Of these 192 institutions, 143 have libraries that participate in the Consortium of College and Research Libraries in Illinois (CARLI, 2009c).

Table 1

Illinois Accredited Colleges and Universities with Participating Libraries in the Consortium of College and Research Libraries in Illinois (CARLI)

IBHE institution type	Total	CARLI libraries	Percent
Public Universities	9	9	100.0
Community Colleges	48	44	91.6
Independent – Not For Profit	97	76	78.3
Independent – For Profit	35	12	34.2
Other	3	2	66.6
Total	192	143	74.4

There are an additional five institutions with research libraries in CARLI that are not affiliated with a postsecondary school and two institutions that have an Illinois Board of Higher Education (IBHE) institutional designation of “Other”. These seven libraries will not be considered in this survey. The community college affiliated with the researcher of this study will not be considered as well.

CARLI began operating on July 1, 2005 and was formed by consolidating three existing Illinois academic library consortiums. The impetus for establishing this statewide consortium is defined on the CARLI web site:

To improve the efficiency and cost effectiveness of services, increase the effectiveness of consortial and member library staff efforts, and create opportunities to pursue new programs and services that the three constituent consortia would not have been able to provide on their own. (CARLI, 2009a)

Membership to CARLI is open to any postsecondary institution that is recognized by the Illinois Board of Higher Education (IBHE) and is also a member of the Illinois Library and Information Network (ILLINET). CARLI offers three levels of membership, each having different entitlements and responsibilities. A central service provided to Governing members is participation in the I-Share catalog:

Basic Membership (16)

Basic Members are eligible for selected services and programs, and are not eligible for participation in CARLI governance or voting. Basic members pay a \$100 annual membership fee.

Associate Membership (30)

Associate Members are eligible for most services and programs, and participate in CARLI governance as a group, represented by a single voting member on the CARLI Board of Directors. Associate Members pay a \$500 annual membership fee.

Governing Membership (107)

Governing members are eligible to participate in all CARLI products, services, and programs, at fullest level of central support and may participate in all CARLI committees, task forces, and user groups. Governing members also receive priority status on waiting lists to join I-Share and other premium services, and enrollment in training sessions. Each Governing Member institution has a vote in the governance of the consortium. Governing members pay an annual fee calculated by student FTE enrollment and institution type. Annual membership fees range from a minimum of \$1000 to a maximum of \$10,000. (CARLI, 2009b)

I-Share is a consortium of 76 CARLI libraries that share a common ILS. I-Share runs on the Voyager ILS software platform developed by The ExLibris Group and supports modular functions including: circulation, cataloging, acquisitions, serials control, course reserves, reports, and systems administration.

One of the key features of I-Share is its support for resource sharing among participating libraries through patron-initiated borrowing. I-Share member libraries agree to make available their collections with other I-Share libraries hence items not available locally can be self-requested by patrons through the I-Share catalog. Requested items are sent from the lending library to the borrowing library through a daily courier. Additionally, any I-Share library patron may visit and borrow items onsite from other I-Share libraries.

The I-Share database contains over nine million unique bibliographic records and approximately 32 million total records, representing the collections of 76 I-Share member institutions. The aggregation of these individual collections into a single catalog provides I-Share library patrons ready access to a collection larger than most of the greatest research libraries in the world (CARLI, 2009c).

One important distinction is the relationship of CARLI and I-Share. CARLI membership is not tantamount to participation as an I-Share library. I-Share can be thought of as a subset of the greater CARLI consortium. Only those libraries that have elected to enroll as Governing members are eligible for I-Share participation.

Table 2

College and Research Libraries in Illinois (CARLI) Participation in I-Share by Library Institution Type

IBHE institution type	I-Share	Non I-Share	Total
Public Universities	13	1	14
Community Colleges	16	28	44
Independent – Not For Profit	44	32	76
Independent – For Profit	3	9	12
Other	0	2	2
Total	76	72	148

It should also be noted that becoming an I-Share library requires an initial investment of time, technical expertise, and start-up funds. The process of unbundling and migrating bibliographic records into an ILS such as I-Share is “complex, time-consuming, and expensive” (Cervone, 2007, p.61). For some libraries, this process may require added record maintenance by a third party vendor such as OCLC. This process can be cost prohibitive for some libraries otherwise desiring to join I-Share. As a consequence, preparation for open enrollment periods to join I-Share must be carefully coordinated by CARLI administrative staff and libraries wishing to participate in I-Share.

Table 3

I-Share Enrollment Since 2001

Year	Libraries enrolled
2001	Enrollment closed
2002	Enrollment closed
2003	12
2004	9
2005	Enrollment closed
2006	Enrollment closed
2007	6
2008	4
2009	Enrollment closed
2010	Enrollment closed

Research Questions***Primary Research Question***

What are the factors that influence an academic library director's decision to join, or not join, a statewide academic library consortium sharing a common integrated library system?

Sub-questions

1. What are the advantages of participating in I-Share as perceived by member and non member library directors?

2. What are the disadvantages of participating in I-Share as perceived by member and non member library directors?
3. What are the obstacles to joining I-Share as perceived by member and non member library directors?

Definition of Terms

Acquisitions budget - Funds allocated for materials which are purchased for library use. Examples include books, periodicals and library databases.

Bibliographic database- A database which indexes and contains references to the original sources of information. It contains information about the documents in it rather than the documents themselves (University Library – UIUC, 2008).

Bibliographic record - The unit of information fields (e.g. title, author, publication date, etc.) which describe and identify a specific item in a bibliographic database (University Library – UIUC, 2008).

CARLI - Consortium of Academic and Research Libraries in Illinois.

Circulation - The lending of library material.

Collection Development – The selection of library material.

Consortium - A cooperative association of libraries of different types. Its purpose is to share human and information resources so that the collective strengths of the institutions facilitate the research and learning of the member's constituents (Panchakshari, n.d.).

IBHE – Illinois Board of Higher Education.

ILLINET - Illinois Library Network. A state-sponsored consortium of more than 5000 academic, public, school and special libraries that do not share a common integrated library system.

I-Share – Integrated library system that serves 76 academic and research libraries in Illinois.

Integrated library system (ILS) – An enterprise level relational database comprised of modules that coordinate and manage all library functions.

Interlibrary Loan – A library mediated activity of borrowing materials on behalf of a patron (Panchakshari, n.d.).

MARC record – A bibliographic record formatted in the international standard for the arrangement of cataloging information so that it can be stored and retrieved using computer tapes (University Library – UIUC, 2008).

Monograph - A book.

Multi-Type Library System – Library systems comprised of school, public, special and academic libraries.

Nonreturnable – An item such as a photocopy of an article that is requested from a library that does not have to be returned.

Online catalog - A computerized catalog of books and other items in the library. Also known as an OPAC (University Library – UIUC, 2008).

OCLC – The Online Computer Library Catalog. A database is used for cataloging, for reference work, and for interlibrary loan. It is the world's largest and most comprehensive database of bibliographic information.

OPAC – A computerized catalog of books and other items in the library. Also known as an online catalog (University Library – UIUC, 2008).

Patron – A library user.

Patron Initiated Borrowing – The ability of a library user to initiate an unmediated request to borrow material from another library through an online catalog.

Reciprocal Borrowing – An arrangement between libraries that allows registered library patrons to borrow material from libraries other than their home library (Davis, 2005, p. 26).

Returnables – Books or other library materials received from a lending library that must be returned.

Serial - Materials issued at regular or irregular intervals and intended to continue indefinitely. Includes periodicals, magazines, journals, and yearbooks (University Library – UIUC, 2008).

Unbundling – The process of removing bibliographic records from an integrated library system.

Universal Catalog – the online catalog of consortial libraries sharing the same integrated library system.

Voyager - Integrated library system platform developed by The ExLibris Group.

Delimitations

According to Creswell (2003), delimitations and limitations establish boundaries for exceptions, reservations, and qualifications inherent in research (p. 147). With respect to this descriptive study, the scope is limited specifically to CARLI academic library directors.

It is important to remember that library consortia are often dissimilar. Missions, funding, governance, membership criteria, and bibliographic standards give each consortium a unique institutional signature. Hence, the findings of this study are bound by the composition and organizational structure of the CARLI consortium and I-Share.

Significance of the Study

For those old enough to remember, the hub of every library was a one time a piece of furniture commonly known as the “card catalog”. Author, title, and subject cards in the wooden drawers of this cabinet represented tangible links to a collection. If so inclined, one could figuratively wrap their arms around an entire library. That was another time.

Today, libraries find themselves at a crossroads. The digital era has ushered unprecedented access to material with the click of a mouse. It has also introduced philosophical conundrums as library directors sort through the challenges of a digital tsunami consuming their libraries. For some material types, change has already taken place. Recent surveys suggest as many as 80% of academic libraries have cancelled print periodical subscriptions in lieu of their online counterparts (Zambare et al, 2009, p. 70).

Digitization of the printed book however has been slower to evolve. Although efforts to make available full-text books through the internet are underway, it is a complicated and timely process to put entire collections online. Project Gutenberg represents the largest effort to digitize classic tomes in the public domain. Since its inception, there have been over 4000 books digitized through this free service (Hart, 2002, p.35).

Notwithstanding the contribution of Project Gutenberg, many factors preclude a freely accessible digital library of books. Copyright is one major factor. Challenges centered upon intellectual property rights, as demonstrated with the recent lawsuit filed against Google by the American Library Association (Koehler, 2008), will likely hinder efforts to digitize library collections into the foreseeable future. Furthermore, the sheer scope of physically digitizing every volume held in a collection will take many years - if such an undertaking can be completed at all.

Against this backdrop is the choice for an academic library in Illinois to join a consortium sharing an integrated library system. CARLI's I-Share catalog contains approximately 32 million items, the third largest academic collection of volumes held in the United States. I-Share also has as its flagship institution the University of Illinois – Urbana Champaign with the nation's fourth largest collection by volumes held (American Library Association, 2009). Ostensibly the opportunity to share a collection as large as I-Share's would serve as a reason to join this consortium. However 72 (49%) of CARLI's 148 academic libraries have elected not to pool their collections into the massive I-Share catalog.

The fact remains that studies seeking to explain why some libraries may defer the opportunity to join a consortium have yet to be addressed substantively in library literature (Kinner & Crosetto, 2009). Hence it is the goal of this descriptive study to describe how CARLI academic library directors perceive I-Share participation. By discovering how these directors view I-Share membership, a glimpse into their management philosophies may also be discerned. This knowledge may prove valuable to college and university library directors seeking to position their libraries for the

challenges associated with a digital age. Those holding positions of leadership in library consortia may also find the information in this study helpful to better understand the issues that discourage and prevent interested libraries from joining a library consortium.

Four additional chapters comprise the balance of this dissertation. Chapter 2 presents a review of the literature regarding participation in a library consortium. This chapter is built around three themes: the advantages, disadvantages and obstacles associated with joining a library consortium. The methodology for this dissertation is presented in Chapter 3. In this chapter the researcher explains the descriptive survey used to identify the factors influencing a CARLI library director's decision to join I-Share. Findings from the survey of CARLI directors are presented in Chapter 4. Presentation of these data are divided by I-Share and non I-Share participant responses and further segmented through four institution types: 1) public universities, 2) community colleges, 3) independent – not for profit, and 4) independent – for profit. A discussion of this study's findings concludes the dissertation in Chapter 5.

CHAPTER 2

LITERATURE REVIEW

Sustained reading leading to the acquisition of knowledge is important and is good for the individual and for society. We wish to demonstrate that print-on-paper (the “book”) is the vehicle for sustained reading and is likely to remain so for the foreseeable future. (Crawford & Gorman, 1995, p. 14)

Creswell (2007) suggests that one purpose of a literature review is to see how one’s proposal for research “fits into or extends the literature” (p. 103). Working from this premise, the goal of this researcher is to present through the literature, the panoply of issues encountered by library directors when considering membership in a large consortium. It is hoped this may equip the reader with a foundation for better understanding the decision to join, or not join, a large academic library consortium sharing an integrated library system (ILS).

This review of literature has been organized in six parts. The first part provides an introduction to consortial cooperation in American higher education. This is followed by a history of library consortia. Parts three, four and five discuss library consortial membership with respect to advantages, disadvantages, and obstacles to joining. Views held by academic librarians about the future of libraries banding together through consortial partnerships concludes the review.

Introduction to Higher Education Consortia

There were nearly 1500 consortia tethering colleges and universities in the United States in 2009 (Minearo, 2009). This number belies to some degree the relative late start of inter-institutional cooperation in American higher education that began in the early twentieth century. Until this time, the concept of consortial partnership was unthinkable among fiercely independent colleges and universities (Johnson, 1967).

The Claremont Colleges in California are often regarded as establishing the first formal higher education consortium in the 1920s (Moore & Office of Education, 1968). The 1930s and 1940s saw modest interest in inter-institutional cooperative arrangements, many of which were limited to geography (Patterson, 1970). The movement to coalesce was accelerated after World War II. Swelling enrollments brought forth by the GI Bill pushed colleges and universities to pool resources in hopes of streamlining curriculum and making better use of facilities and faculty (Moore & Office of Education, 1968).

Federal encouragement for inter-institutional cooperation was responsible for a surge in consortia in the late 1960s. The Higher Education Act of 1965 incentivized the formation of consortia by providing grants to institutions willing to formally work together (Moore & Office of Education, 1968). This legislation would help harness the intellectual capital spread among college and university campuses for projects of national importance - the construction of a particle accelerator with the Atomic Energy Commission in the late 1960s being one example (Johnson, 1967).

Dependence upon external sources for funding further encouraged colleges and universities to establish formal cooperative relationships through the 1970s and 1980s. Since the 1990s, communication and information technologies have presented new opportunities for higher education to leverage resources through consortia. By cooperating, rather than competing, colleges and universities have been able to increase efficiency in an era of rising consumer costs for education (Baus & Ramsbottom, 1999).

Consortia types in higher education can be grouped into three general categories. Multipurpose consortia comprise various institution types and can include purposes ranging from faculty exchanges, business services, professional development, and cross-

registration of students (Baus & Ramsbottom, 1999). Scientific and research based affiliations represent another type of consortia. These partnerships consist primarily of universities working with industries and government agencies on special projects. Cooperative consortia, often based on maximizing technology, represent the last type of consortia in higher education. An example of cooperative consortia includes libraries working together to enhance sharing, technology, and purchasing power.

Introduction to Library Consortia

The literature chronicling library consortia in the United States reaches back to the late nineteenth century although much of this record has been published in the past forty years (Bostick & Dugan, 2001). Not until the advent of the automated library system in the late 1960s did the literature become more fecund.

As the rate of publishing increased in the 1960s, manual systems for acquiring and processing material could not keep pace. Library automation systems offered a solution for controlling costs associated with the labor-intensive nature of library acquisitions (Borgman, 1997). These early systems were also prohibitively expensive for many libraries to purchase individually. Affordability necessitated sharing costs by forming consortia. The Online Computer Library Center, formerly the Ohio College Library Center (OCLC) was one of these early consortia.

Founded in 1967, OCLC served as an online network for 54 Ohio colleges to share resources and reduce costs. Today OCLC's WorldCat catalog is the world's largest with more than 1 billion individual items (OCLC, 2009a). Since OCLC's inception, library consortia have continued to flourish. In 2001, there were over 100 large library consortia in the United States (Hiremath, 2001).

The Evolution of Library Consortia

Notwithstanding libraries' putative reputation for cooperation, the formative years of American libraries were fraught with interlibrary competition. In response, E.A. Mac called upon libraries to consort rather than compete in an 1885 article published in *Library Journal*. A year later senior statesman of American libraries Melvil Dewey echoed Mac's entreaty with his own call in *Library Journal* for increased library cooperation (Wiegand, 1996; Kopp, 1998).

Though the admonishment for interlibrary cooperation was rooted in providing better service to library users, there was also a pecuniary motive. Maverick librarianship would be costly. For the newly formed American Library Association, libraries unwilling to share with each other would be inefficient and inevitably debilitating to the fledgling organization (Stevenson & Kramer-Greene, 1983).

Moving from the late nineteenth century, the corpus of literature written about library consortia is scant. In 1933, the presidents from the University of North Carolina and Duke University established the Triangle Research Libraries Network, one of the nation's first major academic library consortia (Bostick & Dugan, 2001). Two additional members would be added later, North Carolina State University and North Carolina Central University. This consortium continues to thrive today.

Interest to coalesce drifted until the late 1960s when new innovations in library technology became more widely available. These cost prohibitive systems served as catalysts for libraries to pool their fiscal resources by creating consortia (Bostick, 2001). Unlike their consortial predecessors, these new consortia were entwined not only by written agreements but also by technology.

In the late 1970s consortial interest again waned. In-house CD-ROM technology represented a cheaper alternative to enterprise-level platforms that were shared among several libraries. However this preference for in-house management of library systems was soon tempered by external forces. “The confluence of several technological, fiscal, organizational, political, and other streams in the late 1980s and early 1990s created an environment well-suited for what many consider a ‘resurgence’ in library consortia” (Kopp, 1998, para.21). This momentum to coalesce helped spawn the first “super consortium”, the International Coalition of Library Consortia, in 1997 (ICOLC, 2009a).

Types of Library Consortia

Library consortia take on many forms. Consortia range from loosely federated buying clubs to inextricably linked automated networks requiring long-standing commitments of both time and money. Allen and Hirshon (1998) describe that each model is promised upon different values, objectives and political realities of its membership. Consortia can also evolve from one model to another as members become more comfortable with each other and develop a collective agenda. G. Edward Evans (2002) classifies consortia types by their level of centralization:

1. Co-operation - the level with the least interaction between participating organizations. Essentially there is no formal common mission, structure, or planning effort. Participants share information as needed and retain all authority with virtually no risk.
2. Co-ordination – the middle level of activity. There are discussions and one or more generally agreed to missions(s) or goals. There may be written documents that outline a common structure and planning/operation process but not in an

official/legal document. While authority remains with the participating institutions there are increased risks for all participants because of the somewhat more formal structure.

3. Collaboration – is the highest level of activity in which there is a very formal, often legal, structure created by the participants. The structure includes the assignment of some authority, planning and operational activities to the newly created entity based on a set of common missions and goals. A collaborative effort also involves participants contributing some of their resources (money, people, time, physical space, etc.) to the program. The expectation is the rewards of the activity will be jointly shared. (p. 275)

Allen and Hirshon (1998) identify four general types of library consortia:

1. Loosely knit federation - typically a grass roots organization governed by its member libraries. These consortia have no central staff and present little risk. Benefits are generally limited to group purchases.
2. Multi-type/multi state network – usually has the value of a central staff, but even is sub-organized by type of library there is a purely voluntary level of cooperation among members who have little common interest. Vendors generally provide the poorest database discounts because the network cannot guarantee a specified level of participation.
3. Tightly knit consortium – may have a sponsoring agency, and may have either a focused membership profile (e.g. research libraries) or heterogeneous profile (e.g. statewide). The organization may rely solely upon institutional funding, or may

supplement their resources with foundation or external funding. The consortium may also share a virtual or online catalog.

4. Centrally funded statewide consortium - has a sponsoring agency and probably a separate source of funds. Members jointly agree on services to purchase based upon shared interests. Staff and the central administration may have a role in formulating or even mandating the agenda and policies. Virtual union catalogs are either in place or under development. (p. 38)

Operational expenses needed to sustain a consortium vary by consortia type.

Davis' (2007) study of 214 library networks, cooperatives and consortia discovered that 96.7% had paid staff and that 100% owned their own budget. In another related study, Perry (2009) found that nearly 30% of library consortia had a budget less than \$500,000 and nearly 15% reported budgets of over \$15 million. Budgets between \$500,000 and \$4.9 million represented the largest percentage at 38% (Perry 2009).

Advantages of Consortial Membership

In 1974 John McDonald identified nine general reasons why libraries choose to cooperate: (1) financial constriction, (2) cost sharing, (3) availability of funds, (4) pressure from numbers, (5) resource improvement, (6) service improvement, (7) management improvement, (8) image enhancement, and (9) technological development (Alexander, 1999). Allen and Hirshon's (1998) list of consortial benefits addresses issues relating to intellectual property and collective brokering of digital resources:

1. To leverage resources by sharing existing collections or resources through virtual union catalogs or through collective document and material delivery services that provide reciprocal access from member library holdings.

2. To reduce the cost of member library operations. Most often this is accomplished by the consortium acting as an agent on behalf of the member libraries to seek a reduced group purchase price for information (such as electronic indexes or journals) that is lower than that which any one institution could achieve alone.
3. To affect the future as to how information will be created, marketed, and purchased by libraries. Consortia are seeking not only to have an effect upon the national and international agendas concerning issues such as pricing policies and copyright laws, but also to bring pressure to bear upon information providers (particularly commercial publishers) to reduce the rate of rise in the cost of information, and to bring down the unit cost of information. (p. 37)

In 2007 Denise Davis, director of the American Library Association Office for Research and Statistics, conducted a survey to discern the benefits of consortial membership as given by participating libraries. Davis' study included 204 networks, cooperatives and consortia in the United States. Table 4 illustrates the service and activity priorities as given by these libraries in descending order.

Table 4

Priority Rankings of Consortial Services and Activities

Rank	Consortial service/activity
1.	Automation, networking, or other technology services
2.	Courier or other document delivery services
3.	Resource sharing of all types
3. (<i>tied</i>)	General professional development
4.	Cooperative purchasing or group discounts
5.	General consulting/technical assistance
6.	Rotating-sharing of all types
7.	Information and referral services
8.	Digitization or other preservation efforts
9.	Library advocacy, public relations, or marketing
10.	Support for services to special populations
10 (<i>tied</i>)	Apply for E-rate on behalf of member libraries
11.	Library and information science collection
12.	Standards/guidelines development or support

Note. From “Library Networks, Cooperatives and Consortia: Summary of Study Findings,” by D. Davis, 2007, Washington. D.C: American Library Association.

Shared Network Technologies

An ILS is defined as “a library management system which deals with many processes and works from a single bibliographic database” (Integrated library system,

2006). Examples of these functions include: providing patrons with the circulation status of desired items, managing financial information, and decreasing the duplication of bibliographic records (Blake, 2006). Often these functions are referred to as “modules”. Common modules associated with an ILS include: circulation, cataloging, acquisitions, serials, and system administration. Many ILS installations range from \$50,000 to well into six figures and beyond (“How to Evaluate,” 2003).

In the 1970s and 1980s, computers for library management were primitive and their functionality limited. These early automated library systems were dedicated to a single process and were unable to communicate with other library system modules (Andrews, 2007). For example, a librarian using the cataloging module could not communicate with the circulation module to determine if a book was on the shelf or checked-out (Kinner & Rigda, 2009).

During this same time, resource sharing of books between libraries required the help of a library staff member. This process involved the submitting of an interlibrary loan request form by the requesting patron. These forms asked for bibliographic information such as: title, author, and publication date. A library staff member would then search for the book using the OCLC bibliographic database and when found, place an electronic request. If the holding library was willing to lend the book, it would be mailed to the borrowing library. This process of mediated searching is still the most prevalent means of resources sharing among libraries today.

Resource Sharing Through Patron-Initiated Borrowing

Resource sharing has been a major impetus for consortial growth and remains important even for consortia whose main work is developing digital collections

(Alberico, 2002). The ability of a library patron to place an unmediated request for material held by another library sharing an ILS is commonly referred to as “patron-initiated borrowing”. Preece and Kilpatrick (1998) characterize patron-initiated borrowing as “self-serve” borrowing. Other terms to describe patron-initiated borrowing are “direct borrowing” and “universal borrowing”.

There are many advantages associated with patron-initiated borrowing in comparison to mediated resources sharing. Patron-initiated borrowing reduces the time for staff involvement and waiting for the patron (Nitecki & Renfro, 2004). Unmediated borrowing also better supports the American Library Association (2008) *Code of Ethics* tenet of protecting a “user's right to privacy and confidentiality with respect to information sought or received”. As declared by Nitecki and Renfro (2004), patron-initiated-borrowing has been the, “biggest breakthrough in resource sharing” (p. 132).

There is also a cost-benefit consideration for academic libraries with patron-initiated borrowing. Academic libraries collectively spent over \$137 million, or roughly 12% of their total acquisitions budgets, on books in 2007-2008 (Bogart & Blixrud, 2009). This outlay is coupled with the fact that book circulation in many larger collections can be as low as 1% in a given year (Kohl and Sanville, 2006). For academic libraries seeking a higher circulation of books within their collections, consortial settings with patron-initiated borrowing will result in more books being circulated than otherwise would have been in a stand-alone environment. This is evidenced by the following case studies.

OhioLINK is the nation's largest academic consortium with a membership of 85 academic libraries and collective holdings of over 48 million items. It was also the first

consortium in the United States to offer patron-initiated-borrowing in 1994 (Munson, 2006). OhioLINK has since experienced a near tenfold increase in resource sharing since introducing patron-initiated-borrowing (Kohl and Sanville, 2006).

Table 5

Academic Library Consortia in the United States Ranked by Holdings

Consortium	Holdings in millions
OhioLINK	48
PALCI (Pennsylvania Academic Library Consortium)	36
CDL (California Digital Library)	32
CARLI (Consortium of Academic and Research Libraries in Illinois)	32
Orbis Cascade (Washington and Oregon)	28

(Note. From “OhioLINK,” 2009, The Ohio Library and Information Network; “Joining PALCI,” 2009, Pennsylvania Academic Library Consortium, Inc.; “Melvyl Catalog Maintenance: UC Berkeley Record load into the Melvyl Catalog,” 2009, University of California; “CARLI - What is I-Share,” 2009, Consortium of Academic and Research Libraries in Illinois; “Questions and Answers About the New Summit,” 2008, Orbis Cascade.)

Savings realized from a diminished demand for traditional mediated borrowing have been an added windfall for OhioLINK. “We have dramatically reduced the traditional interlibrary loan costs between member libraries by using patron-initiated requests and a staffing context that requires little more than low-cost student labor” (Kohl and Sanville, 2006).

A case study seeking to discern the impact of increased consortial membership upon resource sharing was conducted from January 2000 through August 2002 in the Pennsylvania Academic Libraries Consortium (PALCI). As membership increased, so

too did demand for patron-initiated borrowing. The final result revealed a saltation in total resource sharing of nearly 315% representing an increase of 54,699 total requests (Fennewald, 2005).

Another example of increased resource sharing with added membership was found in BorrowDirect - the name given to the shared online catalog established by Columbia University, The University of Pennsylvania, and Yale University in 1999. Nine months after libraries from Brown University, Cornell University, Dartmouth College, and Princeton University joined BorrowDirect in 2002 patron-initiated transactions increased to 63,690 items from 12,783 completed the previous year (Nitecki & Renfro, 2004).

Bennett (2007) discovered in his longitudinal study of the Massachusetts Library Network that unmediated patron requests through a shared universal catalog had a positive impact on overall circulation. Patron-placed requests as a percentage of total circulation increased from 1.52% to 6.27% over a four-year period after enhancements were introduced in the OPAC to improve patron-initiated-borrowing.

A recent study published by Munson and Milton (2009) compared the usage patterns of patron-initiated borrowing in the context of two merging consortiums in the Pacific Northwest. The Orbis Library Consortium consisting of 12 postsecondary institutions in Oregon was established in 1997. Three years later in 2000, the Washington State Legislature earmarked funding to establish the Cascade Consortium for Washington's four-year public institutions. In 2003 these two consortiums merged to become the Orbis Cascade Alliance. The findings of Munson and Milton (2009) revealed an increase in borrowing for all students types after the merger of these two consortiums.

In 2002 and 2003 OhioLink embarked upon a study of member institutions to discern users' perceptions of library services. Using a LibQUAL survey, five services were measured: (1) collection of full-text online articles, (2) convenience of borrowing books from other colleges, (3) ease of using online articles indexes, (4) availability of online help when using electronic resources, and (5) informing students of useful library services. Of the five services measured, the "convenience of borrowing books from other colleges" received the highest score (Gatten, 2004).

Another study seeking to learn about faculty and student satisfaction with patron-initiated borrowing was undertaken in 2003. Two online catalogs were the focus of this study: CONSORT representing four colleges in Ohio and the OhioLINK consortial catalog of 85 member libraries. According to Curl (2004), 96% of faculty and 98% of seniors had reported using patron-initiated borrowing in these two consortia (p. 21). Furthermore, 81% of faculty and 59% of seniors said that they were satisfied with the delivery time of their patron initiated requests (Curl, 2004).

Costs associated with mediated interlibrary loan are substantially higher than with patron-initiated-borrowing. According to Brandau (2003), patron-initiated borrowing through a common ILS can cost up to ten times less as compared to traditional mediated interlibrary loan that costs \$28 or more per transaction.

A study at Eastern Washington University compared the impact of patron-initiated borrowing introduced in 2000 on traditional mediated interlibrary loan. It was concluded that patron-initiated borrowing dramatically reduced the demand for the more labor intensive and costly mediated interlibrary loan. Concurrently, patron-initiated borrowing increased the overall demand for borrowing (Munson, 2006).

Morris Library at Southern Illinois University at Carbondale realized similar savings in labor costs after introducing patron-initiated borrowing. Professional librarians devoted less time to processing and approving interlibrary loan requests, allowing less expensive paraprofessionals and student workers to fill this role. This provided more time for librarians to attend to tasks requiring professional attention (Preece & Kilpatrick, 1998).

Notwithstanding the benefits and popularity of patron-initiated borrowing, it has not been able to eclipse traditional – and more costly - mediated interlibrary loan among academic libraries. A recent survey by Williams (2008) of academic libraries discovered that less than one-third of the respondents offered patron-initiated-borrowing through a universal catalog.

Collective Cataloging of Materials

By definition, economies of scale are realized when average unit costs of production decrease as output increases (Economies of scale, 2003). When placed in the context of a consortium sharing an ILS, bibliographic utility costs and redundancies associated with cataloging material can be significantly reduced. This principle of economics supports the over-arching purpose of the library consortium for providing greater efficiency (Bostick & Dugan, 2001).

Many tasks undertaken by cataloging librarians from individual libraries are capable of being pooled when sharing an ILS. Commonly known as “copy cataloging”, consortial libraries may share machine readable cataloging (MARC) records through a common ILS. This copy cataloging can significantly reduce the need for individual

libraries to import bibliographic records from fee-based services such as OCLC or create new records through what is commonly known as “original cataloging.”

For academic libraries with small cataloging staffs, savings realized from lower cataloging costs can be particularly beneficial. Naun and Braxton (2005) describe this relationship in the former ILCSO consortium. “The UC [union catalog] serves a second purpose typical of union catalogs. It serves as a source of copy cataloging; that is, it plays the role of a bibliographic utility for ILCSO, particularly for smaller libraries wishing to keep their OCLC costs down” (p. 311).

Cooperative Training

Better trained library staff provide greater self-sufficiency and cost savings by avoiding third-party support (Anderson, Henderson & Sapp, 2007). However a survey by Cutright (2000) discovered that many library paraprofessional staff do not have the requisite skills to successfully use newer library technologies. Because staff training and professional development can be cost prohibitive for individual libraries, consortia serve as a vehicle for parlaying this expense.

Grant writing on behalf of a consortium is another benefit. Members of the Keystone Library Network in Pennsylvania were awarded two Library Services and Technology Act (LSTA) grants totaling more than \$140,000 to provide training on authority file maintenance in the cataloging module of their shared ILS. The product of this training provided the desired results of simplifying cataloging procedures for member libraries (Weber, Steely, & Hinchcliff, 2006).

Collective Brokering and Group Purchasing

Acting as buying cartels, library consortia have managed to wrest some pricing control from publishers through group purchasing and licensing (Maskell, 2006; Scott, 2003). Wolverton and Bucknell (2008) compared the electronic journal purchasing models of the University of North Carolina at Greensboro and the Carolina Consortium of academic libraries and discovered that the Carolina Consortium was the more effective model. One example cited involved consortium member Meredith College. Before entering the Carolina Consortium Meredith College had 3 Wiley and 11 Springer subscriptions totaling \$9,950. As a consortium member they had access to 1,447 journals from the same two publishers for only a 2% increase.

The University of Pacific discovered that libraries could double their access to periodical titles for nearly the same cost by cancelling print subscriptions in lieu of full-text databases (Hawbaker & Wagner, 1996). Working from this study, the Ontario Council of University Libraries consortium acquired a set of shared online periodicals brokered at a cost that was less expensive than individual library subscriptions (Scigliano, 2002).

Collective brokering has also been welcomed by some library vendors. Working with a single customer has provided an opportunity to reduce operational costs associated with managing individual library accounts (Anderson, 2006). In her article regarding consortial licensing issues, McKee (2005) describes the potential for mutually beneficial relationships between libraries and publishers as “a win-win situation for all” (p. 140).

Motivated vendors are also more willing to listen and become educated about the needs of the library community (Thompson, 2004). Consortia have leveraged their

collective purchasing power to nudge otherwise refractory publishers to craft creative pricing models. In 2009, the International Coalition of Library Consortia issued a statement to publishers seeking common ground in pricing in light of poor economic conditions (ICOLC, 2009c). Publishers responded by announcing strategies to help their consortial library clients cope with limited funds (Tenopir, 2009).

Shared Reference Services

Opportunities for sharing labor in a consortial setting extend beyond the ILS. Reference services can be pooled as well. Despite the challenges of coordinating reference service through an online chat medium, many consortia are finding the demand for this service worth the cost (Meert & Given, 2009).

A study in 2004 undertaken at Southeastern Louisiana University sought to investigate virtual reference as a means for serving distance education graduate students in their library consortium. They concluded that virtual reference software may be a possible way for their consortium to fulfill its responsibility to provide library instruction for all students, particularly those enrolled as distance learners (Guillot & Stahr, 2004).

Interlibrary Communication and Advocacy

Consortia can also serve to mitigate the insular nature of library management. Feedback from a survey of member libraries participating in the Consortium of Rhode Island Academic and Research Libraries (CRIARL) indicated that directors deemed improved communication as an important consortial benefit (Shoaf, 1999). A small college library director in CRIARL offered the following. “By bringing together the colleagues from each library on a monthly basis [this] creates an amazing opportunity for

staff to share ideas, create new projects, have questions answered, and develop professional contacts” (Shoaf, 1999, para.22).

Librarians in the multi-type Paducah-McCracken County Information Network (McNet) consortium in western Kentucky expressed an appreciation for the esprit de corps fostered by working with colleagues in the McNet consortium. “Networking with local librarians offers a sounding board for new ideas or even just an avenue to share common concerns” (Nickell, 2004, p. 24). Writing about the Golden Triangle regional library consortium Cunetto (2005) explains the sense of partnership found in a consortium. “Not only does the consortium provide a means of reducing costs for the member libraries, it also creates a local support/user group for the libraries and better utilizes resources, both technical and financial, within the consortium” (p. 37).

Coordinated Collection Development

Phillips and Williams (2004) define collection development as:

Selection of materials, collection policies, collection maintenance, budget and finance, assessment of needs of current users and potential users, liaison and outreach activities related to the collection and its users, collection use studies, collection assessment and evaluation and planning for cooperation and resource sharing”. (p. 274)

By coordinating these functions, consortia have discovered the increased cost-effectiveness of sharing printed books through a common catalog (Kohl & Sanville, 2006, p.397). Coordinating purchases can also provide a richer collective collection if the money saved by reducing duplication is applied to books not widely held (Kairis, 2003).

The Virtual Library of Virginia (VIVA), a consortium of academic libraries in Virginia, is one example of a consortium realizing substantial savings by working with library partners through cooperative collection development (Millson-Marule, Pathak & Pfeiffer, 2000). Libraries from Columbia University, the University of Pennsylvania, and Yale University have also used cooperative collection development of monographs to economically serve their library users (Nitecki, & Renfro, 2004). Rather than each library purchasing its own copy of a book, one library is responsible for purchasing and sharing. The Triangle Research Library Network also practices coordinated collection development. A recently completed study of their union catalog holdings discovered that 71% of their collective OCLC records were held only by a single institution and just 2% were held by all four campuses of the consortium (“TRLN Reports,” 2006).

According to Thornton (2000) consortia will become important forces in the changing nature of collection development. Because of their buying power of electronic sources, cooperative efforts in collection development will shift from coordinating print collections to managing electronic rights.

Disadvantages of Consortial Membership

The current state of library literature offers little with respect to addressing the problems encountered by libraries participating in a consortium (Kinner & Crosetto, 2009). Peters’ (2003) list of discontents is perhaps the most comprehensive source in the literature delineating consortial shortcomings:

1. *Too many meetings* - Collaborative efforts often involve too much talk and precious little action.

2. *Time delays* – Although the wheels of academe turn slowly, incredibly, the wheels of consortia turn even slower.
3. *Inefficient* – For many projects, attempting to do them consortially is just about the most inefficient means.
4. *Ineffective* – Consortial efforts have a high failure rate. Many wither on the development vine, rather than rot and fall fully developed.
5. *Ineffable* – Sometimes the outputs and outcomes of consortial collaboration are too difficult and complex to express.
6. *Sustainability Issues* – Sustaining any consortial initiative is difficult. Enduring resources commitments to consortial programs are rare.
7. *Scalability Issues* – The CIC, the academic consortium of 12 Midwestern research universities, currently has approximately 40 active e-resource agreements.
8. *Too Many* – Paula Kaufman states there are now too many consortia. From the institutional perspective, participating in so many consortia requires significant amounts of staff time and effort to sustain.
9. *Too Ossified* – Consortia tend to be younger and more nimble than their member libraries. Member libraries can exploit this to their advantage, but it also can be a source of jealousy between the consortium staff and the member libraries.
10. *Idea and Reality out of Whack* – Collaboration always begins as a vision or idea. The placement of collaboration on an ideal pedestal appears to have occurred within the last 50 years, perhaps as recently as the last 20 years. It is rare to hear anyone argue that the abstract idea of collaboration is ridiculous.

11. *Competition Trumps Collaboration* – Compared to collaboration, competition is the stronger, more natural drive. In the realm of scarce resources, competition makes sense.

12. *Surly Alexandrians* – We are all surly Alexandrians. The Alexandrian ideal – to have all information held locally at our fingertips – burns in our hearts. (p. 111)

Peters' eleventh point regarding the scarcity of resources is echoed by Carlson (2003).

By brokering deals on behalf of entire groups of libraries, consortia have become complicit in allowing some vendors to corner markets thus penalizing those libraries that purchase products and services individually.

There is also a danger of consortial saturation. As libraries join more consortia, competition comes into play as these libraries try to leverage their resources by utilizing multiple layers of consortial agreements (Westmoreland & Shirley, 2004). Consortia with better brokering packages subsequently raid membership of other consortia as libraries follow the best deals. The net result leaves all consortia with divided memberships with multiple allegiances.

Obstacles to Consortial Membership

Loss of Local Autonomy

Writing about the concessions required with consortial membership McDonald (2003) states, "thinking consortially means you voluntarily give up some autonomy" (p. 294). The degree of forfeiture can vary among types of library consortia. For those consortia sharing an ILS, acceding management of a local automation environment can be tantamount to losing an identity (Breeding 2004).

Kinner and Crosetto (2009) explain that, “relinquishing even a portion of one’s autonomy . . . may compromise some services and support” (p. 428). James Williams, dean of libraries at the University of Colorado, is unequivocal in his counsel to academic libraries faced with supporting mutually exclusive missions. He admonishes directors to negotiate or cancel their consortial membership when “thrust into situations of disadvantage” (Snyder, 2004, p.6). A different perspective is offered by David Wright (2005) of Mississippi College who recommends that libraries see political realities and work through existing structures.

Consortial politics can also encroach upon local control. In her article stressing the importance of teamwork for consortial success, German (2008) remarks that, “it is hard to imagine a more political position in librarianship than that of a leader of a consortium” (p. 12). Peters (2003) in his article delineating the problems with consortial membership characterizes the act of civilized behavior in these environments as a “delicate, tense process” (p. 111).

For some directors of smaller libraries, a “big fish/little fish” complex is enough to preclude consideration of joining a larger consortium (Blake, 2006). Mark Sandler of the Committee on Institutional Cooperation (CIC), a consortium of Big Ten universities and the University of Chicago, recognizes the political reality of “big school” hegemony in consortial settings (German, 2008).

For the Orbis consortium it has been the smaller schools with whom the power has been vested. Carver (2000) describes how the higher representation of smaller libraries has acted to discomfit the will of less-numerous larger libraries. In one scenario involving policy setting for loan periods, small private schools favoring more liberal

circulating policies were approved with a “few strong voices on the dissenting side” (Carver, 2000, p. 18).

Trust is another important consideration. In observing consortium leaders negotiating with vendors, Ann Okerson of Yale University Libraries noticed,” at the start of cooperative ventures, there was always a strong and understandable hesitation to trust unknown negotiators. Each member felt a compelling need to participate in both negotiations with the vendor as well as a personal study of the contracts” (Hiremath, 2001, p. 86).

G. Edwards Evans, sharing his experience with the Statewide California Electronic Library Consortium, concluded that trust was a key factor in the success of this consortium. “The bottom line is successful consortia require time to develop, a high level of trust in one’s partners, and a willingness to contribute” (Evans, 2002, p. 286). Bernard F. Reilly, president of the 230 member College and Research Libraries consortium published this pledge to his membership to allay any fears of potential conflicts in local and enterprise level missions:

To extend our reach we seek to form partnerships with other organizations. We undertake these with care, cautious not to compromise our mission or our accountability to the membership. For this reason the primary determinant of the value of the value of each partnership is the extent to which it makes available to CRL the capabilities and capacities necessary to advance the interests of our members. (Reilly, 2002, p. 1)

Aversion to Risk Taking

With respect to leadership, the literature suggests that library directors are not comfortable acting as change agents. A staid approach to management is often about keeping within the bounds of a comfort zone of familiar colleagues and associations. John Helmer, executive director of the Orbis Cascade Alliance consortium describes the debilitating impact of allegiance as “loyalty to organizations that have outlived their mission or not progressed” (Helmer, 2004). Helmer continues by citing the lack of political will of some librarians to attempt radically different organization structures.

David Wright (2005) attributes the barrier to forming new alliances to a lack of vision at the expense of all those who may share in the project. “In a time of rapid change, libraries and consortia must have a vision of what is truly important and essential in the provision of services to faculty and students” (p. 53). Borek, Bell, Richardson and Lewis (2006) echo this theme by imploring libraries to put the interest of users first with and not allow petty differences and politics stanch progress of information access.

Morgan (1998) in his article ascribes the inertial leadership of some library directors to “difficulty of making a paradigm shift to resource sharing” (p. 41). Addressing the ethos of library leadership Riggs (1999) states, “it is uncommon to learn about academic libraries promoting risk-taking – they are conservative organizations” (p. 6). When faced with an opportunity to engage a new technology, library administrators often defer taking the risk and responsibilities of new system (Breeding, 2002).

Membership Costs and Eligibility Requirements

Many statewide library consortia have historically received subsidies from state government for operational costs and resource subscriptions. However diminished state revenues in recent years have forced some consortia to enact or raise membership fees. For small and independent college libraries, fees associated with consortial membership and licensing can be a major barrier to participation (Wright, 2005).

The literature is replete with recent stories about funding cuts for statewide consortia. In 2005 OhioLink instituted a membership fee for the first time to mitigate an anticipated shortfall of state funds (Allen, 2005). Academic libraries in South Carolina's PASCAL consortium recently approved a "survival plan" that included a 20% increase in membership dues to offset legislative cuts (Albanese, 2008). In Missouri, MOBIUS member libraries have seen their dues increase 36% after the legislature cut \$650,000 in subsidies (Albanese, 2005).

Internationally, the news has been equally dire. The International Coalition of Library Consortia has predicted prolonged double-digit cuts that will take consortia years to recover as a result of the economic downturn of 2009 (ICOLC, 2009c). One strategy for recovering these budget shortfalls will inevitably be to increase membership dues.

There is also the consideration for smaller libraries that consortia weighted to the resource needs of larger institutions, many with extensive graduate programs, may not be worth the investment. Examples of these resources include expensive science-related electronic journals and databases. Membership fee models based on brokering deals supporting these more specialized resources may be too expensive for smaller schools without graduate programs (Wright, 2005).

Malviya and Kumar (2007) observe that to achieve a common objective, a consortium must establish eligibility criteria for participants. For smaller, less-technologically equipped libraries these standards may be a potential hurdle for participation. Common standards associated with academic library consortia include: abiding by resource sharing codes, having a minimum monograph collection size, and the capability to export local bibliographic records in MARC format (CARLI, 2005; MOBIUS, 2009; Orbis Cascade Alliance, 2007).

Preference to Align with a Local Library System

Illinois library systems were created through the Illinois Library Systems Act of 1965. There are currently ten library systems and each is enjoined to honor the guidelines for membership set forth by the *Illinois Library System Act (75 ILCS 10/1 et seq)*. According to the statute, “full and developmental membership in an Illinois Library System is open to any legally established library located within or contiguous to the System boundaries” (Lewis & Clark Library System, 1998, p.6). Among the many missions of Illinois library systems is the charge to, “support automated catalogs which make the collections of Illinois libraries accessible online and available for sharing with citizens of Illinois” (Illinois Library Systems, 2007).



Figure 1. Library Systems of Illinois. Illinois State Library (2009). Copyright Illinois State Library and the Office of Secretary of State of Illinois. Reprinted with permission.

Though Illinois library systems are multi-type in nature, membership is comprised primarily of school and public libraries. As of 2008, 201 academic libraries in Illinois were members of an Illinois library system (Illinois Library Systems, 2008). Of these 201 academic libraries, 22 have elected to share an ILS with their local library system rather than administer their own stand-alone ILS or join the statewide academic library I-Share consortium.

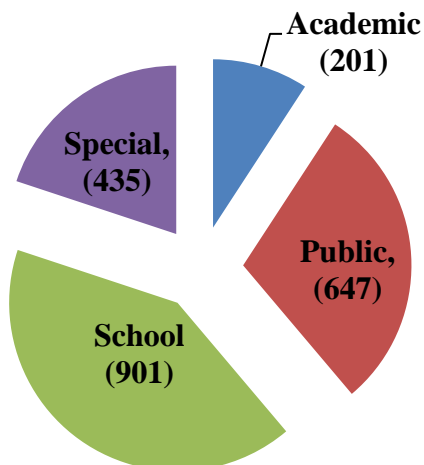


Figure 2. Membership of Illinois Library Systems by Library Type

The Changing Role of the Integrated Library System

Open Source

Although proprietary ILS systems are still operated by the overwhelming majority of libraries (Breeding, 2007) there is growing evidence that these systems have become antiquated (Jaffe & Careaga, 2007). Balas (2007) suggests that the “integrated library system as we currently know it may soon be as much of a relic as the old card catalog” (p. 43). A common refrain from many libraries has been that ILS vendors have become too ossified in their design of systems, failing to consider shifts in workflows attributed to managing digital collections (Kinner & Rigda, 2009).

As digital collections continue to evolve, ILS platforms will undoubtedly require a more robust architecture capable of integrating various metadata schemes with traditional MARC records (Payne, 2007). Wikis, blogs, social bookmarking sites, social networks, and online productivity software are now sharing an equal role with traditional library databases in research pursuits (Houghton-Jan, Etches-Johnson, & Schmidt, 2009).

Metadata harvesting is another example of the need for a more sophisticated ILS architecture. Weaving text, data, media and images result within a single search, this technology can push disparate types of information to specific communities of researchers (Lougee, 2002).

The reality is that users accustomed to Web 2.0 technologies and online course management systems are now expecting a more user-centered interface to a library's collection (Zhonghong, 2009). Patrons now question why their local library catalog is unable to suggest other books based on previous borrowing habits or why they are unable to "see inside" a book by reading excerpts online (Dougherty, 2009). As such, Hammaker (1999) predicts "irrelevance" (p. 37) for the online catalog unless dramatic changes are made to how books are searched. Echoing this theme, Norm Medeiros (2007) of Haverford College expresses "doubts about the long-term future" (p. 235) of today's online catalog.

In light of this dissatisfaction, a movement for an "open source" ILS is challenging the status quo perpetuated by ILS vendors (Breeding 2008). Boss (2008) defines open source software as "software that is free and that includes the original source code used to create it so that users can modify it" (p.1). Advantages of an open source ILS include the ability for customization, lack of proprietary restrictions, and low cost (Boss, 2008). For consortia unwilling or unable to invest the time and expense of migrating to a new ILS (Wang, 2009) the demand for open source may serve as a portent of their eventual demise.

Web-Scaled ILS Models

Having the world's richest bibliographic database, OCLC's plans to launch a web-scaled library management system could completely reshape how libraries position their libraries. Begun in 2009, this initiative hopes to "lower the total costs of managing library collections while enhancing the library user's experience" (OCLC, 2009b, p. 30). Circulation and acquisitions components of this innovative web-scaled system are slated for piloting in 2010. If successful, the reverberations of OCLC's move could elevate the current paradigm of integrated library systems to a "cloud-based" model managed by OCLC (Coyle, 2009). OCLC's venture could dramatically impact the attraction of consortial resource sharing and potentially the attraction of consortia sharing an ILS.

Demand for Printed Books

No other service or image has historically typified the modern library better than the catalog (Kohl 2007). However the future role of the printed book is meriting serious consideration. From 1991 to 2005, total circulation of returnables held by member libraries of the Association of Research Libraries declined 7 % (Association of Research Libraries, 2005). In another survey, The National Center for Education Statistics discovered a 14 % decline in print circulation between 1996 and 2004 (Martell, 2008). These trends suggest a diminished role for the ILS and resource sharing of tangible items.

The Future of Library Consortia

In speaking about the future role of the library consortium Thomas Peters, dean of university libraries at Western Illinois University, posits that, "collaboration involving libraries is crucial to the continued success of libraries . . . the question is not whether or not to collaborate, but how to collaborate and with whom" (Kayler & Pival, 2005, p.

204). Olivia Madison, dean of library services at Iowa State University suggests that the future success of library consortia will rest in their ability to, “easily change with the times and evolving expectations and needs of their members” (Snyder, 2004, p.7).

University of Colorado Dean of Libraries James F. Williams II expounds upon Madison’s theme of adaptability by adding consortial services should also include, “cost savings at the local level” (Snyder, 2004, p.7).

For some librarians, new responsibilities ushered by the digital medium are viewed as a galvanizing force for closer cooperation. Tracy L. Thompson (2004) of the New England Law Library Consortium sees a “bright future” (p.3) for consortia as libraries wade deeper into licensing agreements and group purchases. Malviya and Kumar (2007) believe the dysplastic growth of digital archives will sustain the need for consortia in the twenty-first century and Sloan (2005) sees the confluence of newer technologies coupled with diminishing state revenues as a reason for consortial growth in years to come. Wright (2005) concedes that not all library consortia models work but maintains that participation will become more crucial in the future.

Paula Kaufman, dean and university librarian at the University of Illinois at Urbana Champaign, predicts that library consortia will become fewer, yet much more powerful. She continues by stating the need of consortia to extend vertically to remain viable. This means partnering with K-12, museums, and other special libraries to extend collections (Kaufman, 2001).

In conclusion, Anne Okerson of Yale University Library and Katherine Perry (2009) of the Virtual Library of Virginia conducted a survey to gauge future priorities of consortia. Forty-two surveys were received from consortia based in North America (30),

Europe (8), Australia (3) and Asia (1). The results of their research indicated that budget management and license negotiations will become the highest priorities for libraries in the near future (Perry, 2009).

CHAPTER 3

METHODOLOGY

The transformation in library and information services demands intrepid leadership. Within the profession, we see excitement for boundless possibilities, mingled with apprehension about which directions to pursue. There is enthusiasm for implementing new systems, residing uncomfortably close to nostalgia for the old days. (Schreiber & Shannon, 2001, p.37)

Need for Research

Kinner and Crosetto (2009) ask the question, “Why wouldn’t librarians support the basic concept of collaboration and sharing?” (p. 425). Thus far, the literature has yielded valuable case studies illustrating the advantages of sharing an ILS within an academic library consortium. However, these studies have rarely ventured beyond the benefits.

Meaningful literature describing why a library would not join a catalog “larger than most of the world’s greatest research libraries” (CARLI, 2009c) is still to be written. It is hoped that this descriptive study may set aside any reticence and set into motion “a needed discussion that includes both individual and group concerns” (Kinner & Crosetto, 2009, p. 428) of participating in a consortium anchored by a shared ILS.

Restatement of the Purpose

The purpose of this study was to describe the reasons why a library director has decided to join, or not join, a large academic library consortium sharing a common integrated library system.

Restatement of the Research Questions

Primary Research Question

What are the factors that influence an academic library director's decision to join, or not join, a statewide academic library consortium sharing a common integrated library system?

Sub-questions

1. What are the advantages of participating in I-Share as perceived by member and non member library directors?
2. What are the disadvantages of participating in I-Share as perceived by member and non member library directors?
3. What are the obstacles to joining I-Share as perceived by member and non member library directors?

Description of the Study

Overview

Leedy and Ormond (2010) define the ultimate goal of a descriptive survey as learning something about a large population by asking questions about their “characteristics, opinions, attitudes, or previous experiences” (p. 187). Bryant (2004) defines a descriptive study as having the intent of describing a phenomenon or behavior, rather than explaining it. This descriptive survey endeavored to identify the factors that contribute to an academic library director's decision to participate in a large consortium sharing an ILS.

Population

Illinois has a total of 198 college and university libraries (Illinois Libraries Today, 2004). Of this group, 148 libraries meet both eligibility standards for CARLI membership: 1) recognition from the Illinois Board of Higher Education and 2) membership as an Illinois Library Network (ILLINET) library. These libraries have also elected to pay the minimum \$100 annual Basic membership fee to the CARLI consortium.

CARLI directors from 145 academic libraries served as the sample for this survey. Three academic libraries in CARLI were not considered for this survey – the community college library affiliated with the researcher and two libraries with an IBHE institutional designation of “Other”. Because results of this survey are bifurcated between I-Share and non I-Share libraries, the decision to sample all CARLI libraries improved the probability of receiving a representative response from I-Share and non I-Share libraries among four IBHE institutional types. A response rate of at least 50% for each institution type was expected.

Research Design

The research design for this descriptive study was a web-based survey. The choice of this design method was based upon the usefulness and efficiency of survey instruments to learn about behaviors and opinions of people (Dillman, Smyth, & Christian, 2009). The medium of a web-based survey was selected for its ability to quickly reach large samples at a low cost (Dillman, Smyth, & Christian, 2009) and overcome geographic limitations that may otherwise negatively impact a survey

(Dillman, 2000). Data collection and calculation in a web-based survey is also much faster than a traditional print survey (Cronk & West, 2002).

Potential disadvantages of a web-based survey include distrust - particularly with expectations of anonymity. Another possible disadvantage of a web-based survey is the inability to ensure that an email notification requesting participation in the survey is noticed (Dillman, Smyth, & Christian, 2009).

The web-based survey instrument for this study was developed through the third party company SurveyMonkey. Data collected on SurveyMonkey servers were secured physically in locked rooms. These servers were also electronically protected by a network firewall and RAID 10 redundant array hard drives technology. Instructions to destroy the data were given to SurveyMonkey after being transmitted to the researcher. The researcher will keep this digital data in a secure cabinet for a period of three years before destroying it.

Survey Instrument

The framework for the survey instrument sought to elicit responses from CARLI library directors regarding the perceived advantages, disadvantages, and obstacles to joining the I-Share consortium and their influence upon the decision to join I-Share. Questions for the survey were drawn from the literature review and refined in an iterative process with outside experts from two groups. The first group consisted of officers within the CARLI organization. The second group comprised academic librarians from non I-Share libraries. A pilot of the survey was given to five academic librarians.

The survey instrument consisted of 38 closed-ended, and five open-ended questions dispersed within five sections. The first section consisted of nine closed-ended

questions regarding the profile of the library and survey respondent. Library profile information included: 1) the library's institution type according to the Illinois Board of Higher Education, 2) the enrollment of the library's parent institution according to Carnegie Classification, 3) if the library is an I-Share participant, 4) the number of years of I-Share participation, and 5) whether a CARLI library director that does not participate in I-Share is planning to join in the future. Respondent profile information included: 1) age, 2) gender, 3) race, and 4) academic training.

The second section consisted of 10 closed-ended questions regarding the perceived benefits of participating in the I-Share consortium, followed by an additional closed-ended question asking the degree in which these benefits influenced the respondent's decision to join I-Share. Respondents were asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: "Not Important", "Slightly Important", "Somewhat Important", "Important", and "Very Important". The last question in the second section was an open-ended question asking for comments about the benefits of I-Share participation. The basis for these questions was drawn from the literature as presented in the Advantages of Consortial Membership section in Chapter 2 of this study.

The third section consisted of seven closed-ended questions regarding the perceived disadvantages of participating in the I-Share consortium, followed by an additional closed-ended question asking the degree in which these disadvantages influenced the respondent's decision to join I-Share. Respondents were asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: "Strongly Agree", "Agree", "No Opinion", "Disagree", and "Strongly

Disagree”. The last question in the third section was an open-ended question asking for comments about the disadvantages of I-Share participation. Questions from this section were based upon the literature as presented in the Disadvantages of Consortial Membership section in Chapter 2 of this study.

The fourth section of this study consisted of nine closed-ended questions regarding the perceived obstacles to participating in the I-Share consortium, followed by an additional closed-ended question asking the degree in which these obstacles influenced the respondent’s decision to join I-Share. Respondents were asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: “Strongly Agree”, “Agree”, “No Opinion”, “Disagree”, and “Strongly Disagree”. The last question in the fourth section was an open-ended question asking for comments about the obstacles of I-Share participation. The literature as presented in the Obstacles to Consortial Membership section in Chapter 2 of this study was used to design these questions.

The fifth section asked for comments from two open-ended questions that concluded the survey. These questions asked respondents to: 1) explain their decision to share an ILS with another library system or consortium other than I-Share and 2) summarize how they would explain their decision to join, or not join, I-Share to their immediate supervisor. Comments from these two questions were summarized and presented by I-Share and non I-Share participant responses.

Collection of Data

The provenance of all data used in this study was the web-based survey. Data from the submitted surveys was collected and stored by SurveyMonkey. SurveyMonkey

assigned values to answers to numerically represent the closed-ended responses. These values range from one through five, corresponding to the Likert scale answer options for each question.

These data were electronically transmitted from SurveyMonkey and imported into an Excel spreadsheet. Data was divided between I-Share and non I-Share participants, and further segmented into the four institution types established by the Illinois Board of Higher Education.

Analysis of Data

Analysis of data is presented in four parts. Part one consists of library and respondent profile information. Part two addresses the three sub-questions of this study. Part three tests the difference in I-Share and non I-Share answers to questions in part two. Part four addresses the primary research question of this study.

For part one, library profile information includes: 1) the library's institution type according to the Illinois Board of Higher Education, 2) the enrollment of the library's parent institution according to Carnegie Classification, 3) if the library is an I-Share participant, 4) the number of years of I-Share participation, and 5) whether a CARLI library director that does not participate in I-Share is planning to join in the future. Respondent profile information regarding age, gender, race, and academic training is used to illustrate the characteristics of I-Share and non I-Share library directors.

Part two presents findings associated with the three sub-questions of this study: 1) perceived advantages of I-Share participation, 2) perceived disadvantages of I-Share participation, and 3) perceived obstacles to I-Share participation. Findings were generated by Likert scale responses and presented in tables as frequencies and percentages, and

illustrated with bar charts. According to Leedy and Ormond (2010) a Likert scale is well-suited for assessing behaviors and attitudes in survey research. Presentation of these data are bifurcated between I-Share and non I-Share participants and further segmented into the institution types established by the Illinois Board of Higher Education: 1) Public Universities, 2) Community Colleges, 3) Independent – Not For Profit, and 4) Independent – For Profit. Responses to an open-ended question for each sub-question are summarized by I-Share and non I-Share participants and follow the closed-ended findings.

Part three tests the difference in respondent answers to sub-questions in part two by calculating the mean of all I-Share and non I-Share responses to perceived benefits, disadvantages, and obstacles to I-Share participation. From these two means, an independent samples t-test using the numeric values assigned to Likert responses (Fink, 2009) was conducted for section two (benefits of participation), section three (disadvantages of participation), and section four (obstacles to participation). A 95% confidence interval was used for each independent samples t-test.

Part four addresses the primary research question of this study by presenting respondent answers to three closed-ended and two open-ended questions regarding the factors that influenced their decision to join, or not join, I-Share. As with part two, closed-ended questions in part three are presented in tables as frequencies and percentages, and illustrated with bar charts. The chapter concludes with summaries of two open-ended questions asking respondents to: 1) explain their decision to share an ILS with another library system or consortium other than I-Share and 2) summarize how

they would explain their decision to join, or not join, I-Share to their immediate supervisor.

Table 6

*Composition of the Consortium of Academic and Research Libraries in Illinois (CARLI)
Membership by Institution Type*

IBHE institution type	CARLI libraries
Public Universities	14
Community Colleges	44
Independent – Not For Profit	76
Independent – For Profit	12
Other	2
Total	148

Survey Protocol

The procedure for conducting this survey consisted of the following three steps:

1. One week before implementing the survey, an email was sent to all CARLI academic library directors explaining the survey and the importance of their participation.

2. The survey was linked via an email to all CARLI library directors.

Accompanying the survey was an informed letter of consent - included as Appendix F at the end of this dissertation. There was no compensation for participants. Anonymity of participants was preserved.

3. Two weeks after that survey was sent, a follow-up email was sent to all library directors thanking those that completed the survey and asking those who had not for their participation.

Institutional Review Board

Compliance with ethical protocols and regulations for this study were approved by the Institutional Review Board of the University of Nebraska-Lincoln. A letter of approval to conduct this study by the Institutional Review Board of the University of Nebraska - Lincoln is included as Appendix E at the end of this dissertation.

Bias

There existed in this study a potential for bias. The researcher is currently the director of a CARLI community college library that has been a member of I-Share since 2003. Every effort was made by the researcher to objectively depict the facts and opinions expressed by the subjects as they were presented without bias.

Ethical Considerations

One important ethical consideration of this study was to assure participant confidentiality. Although no personal information that could identify a participant was asked in this survey, instructions were given to SurveyMonkey to destroy all data after they were received by the researcher. As this study involves human subjects, the Institutional Review Board of the University of Nebraska was responsible for authorizing protocols for this study.

CHAPTER 4

RESEARCH FINDINGS

Now that we are starting to see, in libraries, full-text showing up online, I think we are very shortly going to cross a sort of a critical mass boundary where those publications that are not instantly available in full-text will become kind of second-rate in a sense, not because their quality is low, but just because people will prefer the accessibility of things they can get right away. They will become much less visible to the reader community. (Lynch, 1997)

Introduction

The purpose of this study was to describe the perceived advantages, disadvantages, and obstacles that influence an academic library director's decision to join a large academic library consortium sharing an integrated library system. Research findings in this chapter are presented in four parts.

Part one provides data regarding library and personal profile information of survey respondents. Part two presents respondent answers to closed-ended questions regarding the perceived advantages, disadvantages, and obstacles to I-Share participation that address the three sub-questions of this study. Findings from these questions are presented in tables as frequencies and percentages, and illustrated with bar charts. A summary of respondent answers to a concluding open-ended question for each sub-question is presented by I-Share and non I-Share member responses.

Part three compares all I-Share and non I-Share respondent answers to the closed-ended questions regarding the advantages, disadvantages, and obstacles to I-Share participation. Comparisons are made within institution types and collectively for all I-Share and non I-Share respondents. An independent samples t-test using numeric values for Likert scale answers was used to determine if any difference in I-Share and non I-Share respondent answers was statistically significant.

Part four addresses the primary research question of this study by presenting the findings of three closed-ended questions regarding the perceived advantages, disadvantages, and obstacles to I-Share participation upon a decision to join I-Share. These findings are presented in tables as frequencies and percentages, and illustrated with bar charts. A summary of comments from two concluding open-ended questions regarding the decision to join I-Share conclude the chapter.

Profile of Survey Respondents

As stated in Chapter 3, the sample for this study comprised 145 CARLI library directors. Three academic libraries in CARLI were not considered for this survey – the community college library affiliated with the researcher and two libraries with an IBHE institutional designation of “Other”. Surveys were received from 77 CARLI library directors providing a 53.1% response rate. This rate exceeded the average response rate of 33% associated with online surveys (Nulty, 2008). Table 7 presents the respondent rate for the 145 CARLI library directors sampled by institution type and I-Share affiliation.

Table 7

Respondent Rate by Institution Type and I-Share Affiliation

	I-Share	Non I-Share	Sampled	Percent
Public Universities	8	0	14	57.1
Community Colleges	14	12	43	60.5
Independent – Not For Profit	27	10	76	48.7
Independent – For Profit	3	3	12	50.0
Total	52	25	145	53.1

Table 8 presents the respondent rate for the 145 CARLI library directors sampled by institution type within I-Share affiliation. The total response rate for I-Share libraries was 69.3% with 8 library directors from public universities, 14 from community colleges, 27 from independent - not for profit institutions, and 3 library directors from independent - for profit institutions.

The response rate for non I-Share libraries was 35.7%. Twelve library directors were from community colleges, 10 library directors were from independent - not for profit institutions, and 3 library directors were from independent - for profit institutions.

Table 8

Respondent Rate by Institution Type Within I-Share Affiliation

	N	Sampled	Percent
I-Share			
Public Universities	8	13	61.5
Community Colleges	14	15	93.3
Independent – Not For Profit	27	44	61.4
Independent – For Profit	3	3	100
Total	52	75	69.3
Non I-Share			
Public Universities	0	1	0.0
Community Colleges	12	28	42.9
Independent – Not For Profit	10	32	31.3
Independent – For Profit	3	9	33.3
Total	25	70	35.7

The Carnegie Classification of respondent institutions by I-Share affiliation is presented in Table 9. Libraries in “Small four-year (S4)” institutions provided the highest number of I-Share responses with 15 (28.8%). Libraries in institutions classified as “Very small two-year (VS2)” represented the highest number of completed surveys among non I-Share respondents with six (24.0%). Two I-Share respondents did not designate a Carnegie Classification for their institution.

Table 9

Respondent Institution by Carnegie Classification and I-Share Affiliation

	I-Share	Non I-Share	Total
Large four-year (L4)	8	1	9
Medium four-year (M4)	8	0	8
Small four-year (S4)	15	0	15
Very small four-year (VS4)	2	5	7
Very large two-year (VL2)	1	1	2
Large two-year (L2)	5	4	9
Medium two-year (M2)	3	4	7
Small two-year (S2)	6	4	10
Very small two-year (VS2)	2	6	8
No response	2	0	2
Total	52	25	77

Among I-Share respondents, 21 (40.4%) reported the length of their I-Share participation as exceeding 20 years, followed by 16 (30.8%) having participated between 6 to 10 years, and 9 (17.3%) spanning 1 to 5 years. I-Share respondents indicating a participation time of 11 to 15 years received the lowest response with 2 (3.8%). Table 10 presents the length of I-Share member participation by institution type.

Table 10

I-Share Respondent Years of Participation by Institution Type

	1-5 years	6-10 years	11-15 years	16-20 years	Over 20 years	Total
Public Universities	0	0	0	1	7	8
Community Colleges	4	6	0	1	3	14
Independent – Not For Profit	5	7	2	2	11	27
Independent – For Profit	0	3	0	0	0	3
Total	9	16	2	4	21	52

When asked about their interest in participating in I-Share, 5 (20.0%) non I-Share directors indicated an interest to join in the next enrollment period. Twelve (48.0%) directors indicated that they did not plan to join, and 8 (32.0%) directors were undecided. Table 11 presents non I-Share respondent interest in joining I-Share by institution type.

Table 11

Non I-Share Respondent Interest in Joining I-Share by Institution Type

	Plan to join	Do not plan to join	Undecided	Total
Community Colleges	2	6	4	12
Independent – Not For Profit	3	4	3	10
Independent – For Profit	0	2	1	3
Total	5	12	8	25

Table 12 presents respondent age by I-Share affiliation. For both I-Share and non I-Share libraries, directors with ages from 50 to 59 years were the most prevalent with 26 (50.0%) for I-Share directors and 12 (48.0%) for non I-Share directors. One (1.9%) I-Share respondent did not designate an age category.

Table 12

Respondent Age by I-Share Affiliation

	I-Share	Non I-Share	Total
20-29 years	1	0	1
30-39 years	0	2	2
40-49 years	9	7	16
50-59 years	26	12	38
60-69 years	15	4	19
No response	1	0	1
Total	52	25	77

Female respondents represented the majority for both I-Share and non I-Share libraries. Thirty-six (69.2%) I-Share directors indicated their gender as female while 21(84.0%) non I-Share directors were female. Two (3.8%) respondents identified as being I-Share participants did not designate their gender. Table 13 presents respondent gender by I-Share affiliation.

Table 13

Respondent Gender by I-Share Affiliation

	I-Share	Non I-Share	Total
Male	14	4	18
Female	36	21	57
No response	2	0	2
Total	52	25	77

Fifty (96.2%) I-Share directors and 25 (100%) non I-Share directors indicated their race as being white. One (1.9%) I-Share respondent was African American and another did not designate their race. Table 14 presents respondent race by I-Share affiliation.

Table 14

Respondent Race by I-Share Affiliation

	I-Share	Non I-Share	Total
White	50	25	75
Black or African American	1	0	1
No response	1	0	1
Total	52	25	77

Respondents having attained both a library science and non library science-related master's degree received the highest designation among I-Share directors with 23 (44.2%). For non I-Share directors, academic training consisting of a Master's degree in library science was indicated most frequently with 16 (64.0%). Table 15 presents respondent academic training by I-Share affiliation.

Table 15

Respondent Academic Training by I-Share Affiliation

	I-Share	Non I-Share	Total
Baccalaureate degree only	1	0	1
Master's degree (library science-related)	18	16	34
Master's degree (non library science)	2	0	2
Master's degree (library science-related) plus a Master's degree (non library science)	23	7	30
Master's degree (library science-related) plus a Doctorate degree	7	2	9
Master's degree (non library science) plus a Doctorate degree	1	0	1
Total	52	25	77

Responses to Sub-questions

Findings in this section address the three sub-questions of this study through 26 closed-ended and three open-ended questions:

1. What are the advantages of participating in I-Share as perceived by member and non member library directors?
2. What are the disadvantages of participating in I-Share as perceived by member and non member library directors?
3. What are the obstacles to joining I-Share as perceived by member and non member library directors?

For each sub-question, findings from closed-ended questions are presented in tables and illustrated with bar charts. A summary of respondent answers to a concluding open-

ended question for each sub-question is presented by I-Share and non I-Share member responses.

First Sub-question - Advantages of I-Share Participation

The following section presents findings that address the first sub-question of this study regarding the perceived advantages of I-Share participation. Closed-ended findings are presented first, followed by a summary of respondent answers to a concluding open-ended question.

Closed-ended Questions and Findings

The findings of the following 10 questions represent the perceived benefits of I-Share participation by I-Share and non I-Share respondents. Each respondent was asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: “Not Important”, “Slightly Important”, “Somewhat Important”, “Important”, and “Very Important”. These answers are presented in the following tables as frequencies and percentages.

To numerically represent respondent answers, values ranging from one to five were assigned to the five Likert scale answer options to derive a mean score: “Not Important”(1), “Slightly Important”(2), “Somewhat Important”(3), “Important”(4), and “Very Important”(5). All findings in the following tables are bifurcated between I-Share and non I-Share respondents and further segmented by institution type. A bar chart follows each table to graphically illustrate findings.

Table 16 presents respondent views regarding the importance of access to a large, academically-focused collection. I-Share public university libraries viewed this benefit

as “Very Important” and all other I-Share library types as “Important”. Non I-Share libraries from independent – not for profit libraries also viewed this as “Important”.

Table 16

The I-Share Benefit of Access to a Large, Academically-Focused Collection

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	0 0.0%	8 100.0%	5.00
Community Colleges	14	0 0.0%	0 0.0%	1 7.1%	0 0.0%	13 92.9%	4.86
Independent – Not For Profit	27	0 0.0%	1 3.7%	0 0.0%	4 14.8%	22 81.5%	4.74
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	0 0.0%	2 66.7%	4.33
Non I-Share							
Community Colleges	12	0 0.0%	0 0.0%	2 16.7%	9 75.0%	1 8.3%	3.92
Independent – Not For Profit	10	0 0.0%	0 0.0%	3 30.0%	1 10.0%	6 60.0%	4.30
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	2 66.7%	0 0.0%	3.67

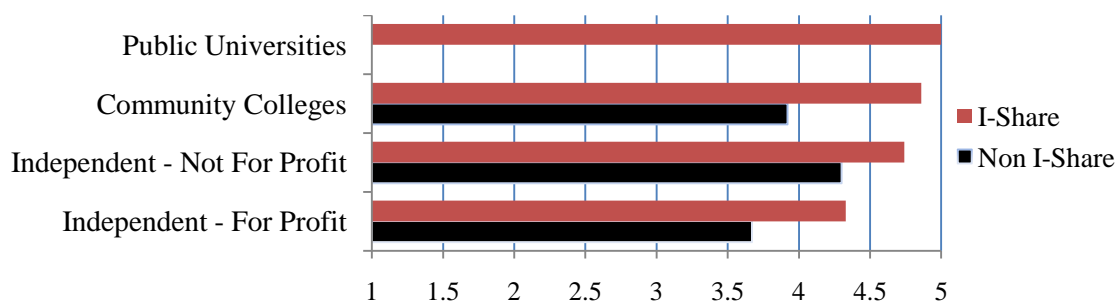


Figure 3. The I-Share Benefit of Access to a Large, Academically-Focused Collection

Table 17 shows I-Share public university, community college, and independent – not for profit libraries viewed patron-initiated borrowing as “Important”. Non I-Share libraries from independent – for profit institutions replied with “Slightly Important”.

Table 17

The I-Share Benefit of Patron-Initiated Borrowing Through the I-Share Catalog

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	1 12.5%	7 87.5%	4.88
Community Colleges	14	0 0.0%	0 0.0%	1 7.1%	2 14.3%	11 78.6%	4.71
Independent – Not For Profit	27	0 0.0%	1 3.7%	1 3.7%	2 7.4%	23 84.6%	4.74
Independent – For Profit	3	1 33.3%	0 0.0%	0 0.0%	0 0.0%	2 66.7%	3.67
Non I-Share							
Community Colleges	11	1 9.1%	0 0.0%	2 18.2%	5 45.5%	3 27.3%	3.82
Independent – Not For Profit	10	1 10.0%	3 30.0%	2 20.0%	1 10.0%	3 30.0%	3.20
Independent – For Profit	3	0 0.0%	1 33.3%	2 66.7%	0 0.0%	0 0.0%	2.67

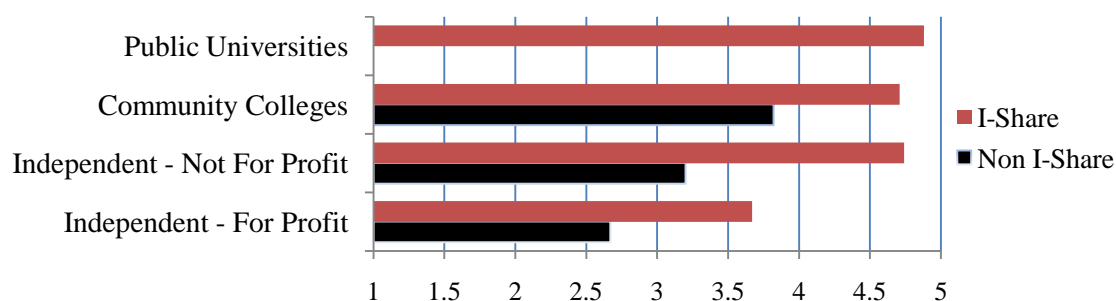


Figure 4. The I-Share Benefit of Patron-Initiated Borrowing Through the I-Share Catalog

Table 18 shows that I-Share libraries at public universities and community colleges considered onsite reciprocal borrowing as “Important”, while all other library types viewed onsite reciprocal borrowing as “Somewhat Important”.

Table 18

The I-Share Benefit of Onsite Reciprocal Borrowing at Other I-Share Libraries

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	3 37.5%	4 50.0%	4.38
Community Colleges	14	0 0.0%	0 0.0%	5 35.7%	2 14.3%	7 50.0%	4.14
Independent – Not For Profit	26	0 0.0%	3 11.5%	5 19.2%	8 30.8%	10 38.5%	3.96
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	1 33.3%	1 33.3%	3.67
Non I-Share							
Community Colleges	11	1 9.1%	0 0.0%	3 27.3%	5 45.5%	2 18.2%	3.64
Independent – Not For Profit	10	1 10.0%	1 10.0%	4 40.0%	1 10.0%	3 30.0%	3.40
Independent – For Profit	3	0 0.0%	1 33.3%	1 33.3%	1 33.3%	0 0.0%	3.00

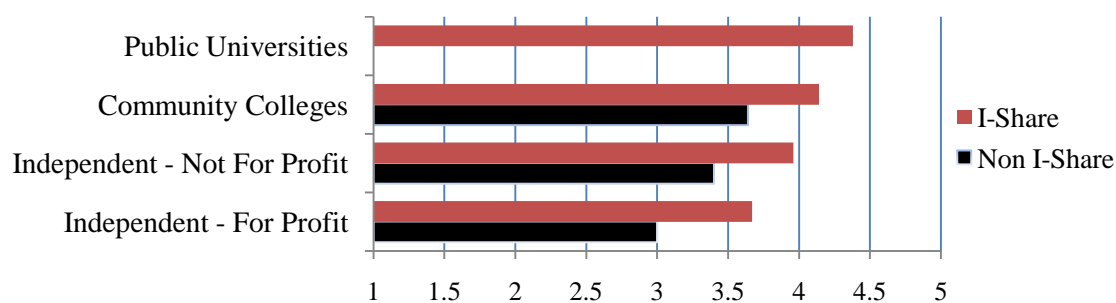


Figure 5. The I-Share Benefit of Onsite Reciprocal Borrowing at Other I-Share Libraries

Table 19 shows that five library types viewed the I-Share benefit to coordinate collection development as “Somewhat Important”. Libraries from I-Share independent – for profit institutions viewed coordinated collection development as “Not Important”.

Table 19

The I-Share Benefit to Coordinate Collection Development with Other I-Share Libraries

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	3 37.5%	3 37.5%	2 25.0%	3.88
Community Colleges	14	0 0.0%	2 14.3%	1 7.1%	9 64.3%	2 14.3%	3.79
Independent – Not For Profit	27	2 7.4%	5 18.5%	8 29.6%	10 37.0%	2 7.4%	3.19
Independent – For Profit	3	1 33.3%	2 66.7%	0 0.0%	0 0.0%	0 0.0%	1.67
Non I-Share							
Community Colleges	12	1 8.3%	3 25.0%	3 25.0%	5 41.7%	0 0.0%	3.00
Independent – Not For Profit	10	1 10.0%	3 30.0%	3 30.0%	3 30.0%	0 0.0%	2.80
Independent – For Profit	3	0 0.0%	1 33.3%	1 33.3%	0 0.0%	1 33.3%	3.33

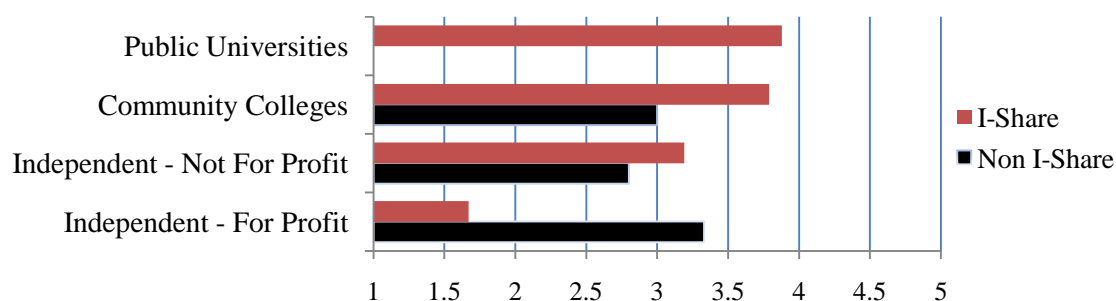


Figure 6. The I-Share Benefit to Coordinate Collection Development with Other I-Share Libraries

Table 20 presents the advantage of the integrated library system being managed by CARLI staff. I-Share libraries from public universities, community colleges, and independent – not for profit institutions viewed this as “Important”.

Table 20

The I-Share Benefit of the Integrated Library System Being Managed by CARLI Staff

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	2 25.0%	6 75.0%	4.75
Community Colleges	13	0 0.0%	0 0.0%	0 0.0%	1 7.7%	12 92.3%	4.92
Independent – Not For Profit	27	1 3.7%	0 0.0%	1 3.7%	7 25.9%	18 66.7%	4.52
Independent – For Profit	3	1 33.3%	0 0.0%	0 0.0%	0 0.0%	2 66.7%	3.67
Non I-Share							
Community Colleges	12	1 8.3%	0 0.0%	4 33.3%	4 33.3%	3 25.0%	3.67
Independent – Not For Profit	10	2 20.0%	1 10.0%	1 10.0%	4 40.0%	2 20.0%	3.30
Independent – For Profit	3	0 0.0%	1 33.3%	1 33.1%	1 33.3%	0 0.0%	3.00

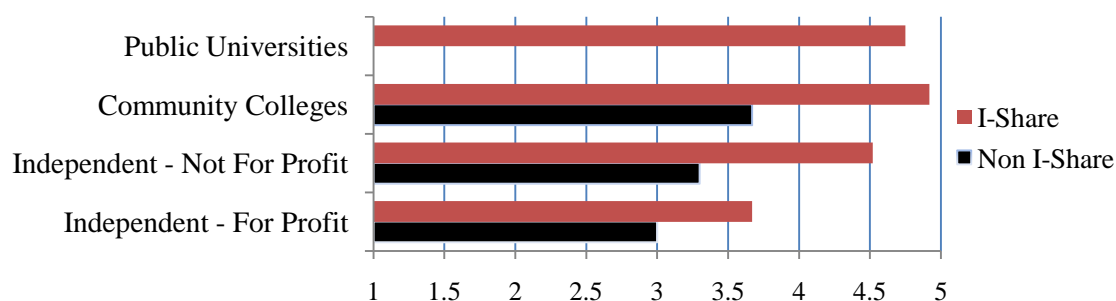


Figure 7. The I-Share Benefit of the Integrated Library System Being Managed by CARLI Staff

Table 21 presents the level of importance of technical support and training for integrated library system modules. I-Share libraries from public universities, community colleges, and independent – not for profit institutions rated this benefit as “Important”.

Table 21

The I-Share Benefit of Technical Support and Training for Integrated Library System Modules

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	3 37.5%	4 50.0%	4.38
Community Colleges	14	0 0.0%	0 0.0%	1 7.1%	1 7.1%	12 85.7%	4.79
Independent – Not For Profit	26	1 3.8%	1 3.8%	2 7.7%	12 46.2%	10 38.5%	4.12
Independent – For Profit	2	1 50.0%	0 0.0%	0 0.0%	0 0.0%	1 50.0%	3.00
Non I-Share							
Community Colleges	12	1 8.3%	1 8.3%	3 25.0%	4 33.3%	3 25.0%	3.58
Independent – Not For Profit	10	2 20.0%	1 10.0%	1 10.0%	4 40.0%	2 20.0%	3.30
Independent – For Profit	3	0 0.0%	0 0.0%	3 100.0%	0 0.0%	0 0.0%	3.00

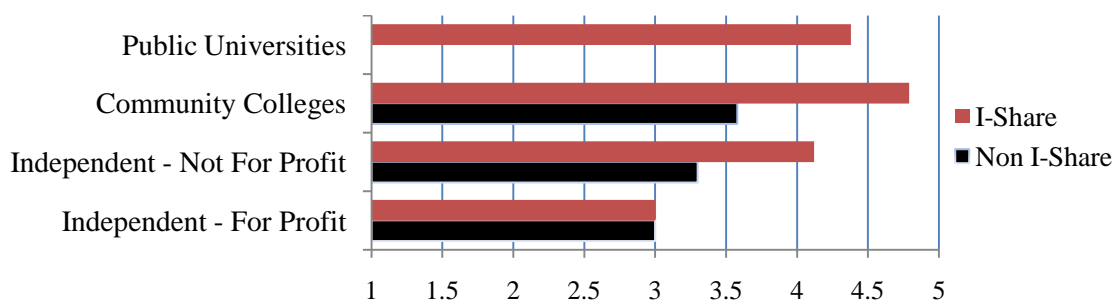


Figure 8. The I-Share Benefit of Technical Support and Training for Integrated Library System Modules

Table 22 shows I-Share community colleges and independent –for profit libraries viewed the ability to import bibliographic records as “Important”. Non I-Share libraries from independent – for profit institutions viewed this as “Slightly Important”.

Table 22

The I-Share Benefit to Freely Import Bibliographic Records from Other I-Share Libraries

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	1 12.5%	0 0.0%	2 25.0%	3 37.5%	2 25.0%	3.63
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	3 21.4%	11 78.6%	4.79
Independent – Not For Profit	27	1 3.7%	3 11.1%	5 18.5%	13 48.1%	5 18.5%	3.67
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	0 0.0%	2 66.7%	4.00
Non I-Share							
Community Colleges	12	2 16.7%	0 0.0%	3 25.0%	5 41.7%	2 16.7%	3.42
Independent – Not For Profit	9	1 11.1%	1 11.1%	4 44.4%	1 11.1%	2 22.2%	3.22
Independent – For Profit	3	1 33.3%	0 0.0%	2 66.7%	0 0.0%	0 0.0%	2.33

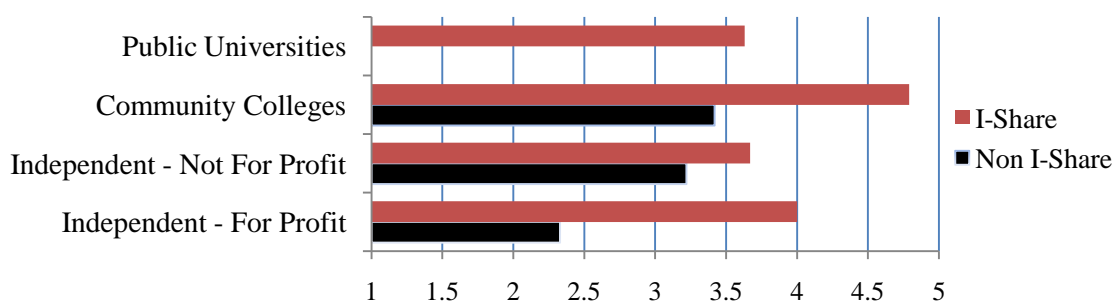


Figure 9. The I-Share Benefit to Freely Import Bibliographic Records from Other I-Share Libraries

Table 23 shows that I-Share libraries from public universities, community colleges, and independent – not for profit institutions viewed the benefit to collaborate with other I-Share libraries as “Important”.

Table 23

The I-Share Benefit to Collaborate with Other I-Share Libraries

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	3 37.5%	5 62.5%	4.63
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	6 42.9%	8 57.1%	4.57
Independent – Not For Profit	27	0 0.0%	2 7.4%	3 11.1%	12 44.4%	10 37.0%	4.11
Independent – For Profit	2	0 0.0%	1 50.0%	0 0.0%	0 0.0%	1 50.0%	3.50
Non I-Share							
Community Colleges	11	0 0.0%	1 9.1%	3 27.3%	5 45.5%	2 18.2%	3.73
Independent – Not For Profit	10	0 0.0%	3 30.0%	4 40.0%	2 20.0%	1 10.0%	3.10
Independent – For Profit	3	1 33.3%	0 0.0%	0 0.0%	2 66.7%	0 0.0%	3.00

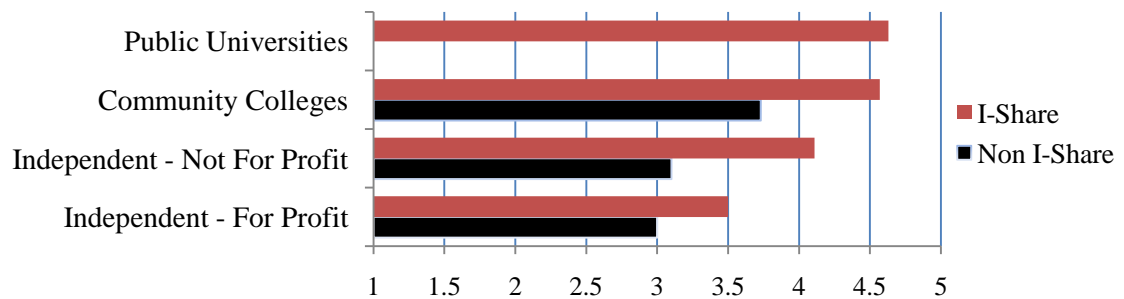


Figure 10. The I-Share Benefit to Collaborate with Other I-Share Libraries

Table 24 shows that I-Share public universities viewed participating in committees and task forces as “Important”. Libraries from I-Share community colleges and independent – not for profit institutions viewed this as “Somewhat Important”.

Table 24

The I-Share Benefit to Participate in I-Share Committees and Task Forces

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	5 62.5%	2 25.0%	4.13
Community Colleges	14	0 0.0%	0 0.0%	4 28.6%	7 50.0%	3 21.4%	3.93
Independent – Not For Profit	27	1 3.7%	4 14.8%	8 29.6%	11 40.7%	3 11.1%	3.41
Independent – For Profit	3	1 33.3%	2 66.7%	0 0.0%	0 0.0%	0 0.0%	1.67
Non I-Share							
Community Colleges	11	1 9.1%	4 36.4%	5 45.5%	1 9.1%	0 0.0%	2.55
Independent – Not For Profit	10	2 20.0%	5 50.0%	1 10.0%	2 20.0%	0 0.0%	2.30
Independent – For Profit	3	1 33.3%	1 33.3%	1 33.3%	0 0.0%	0 0.0%	2.00

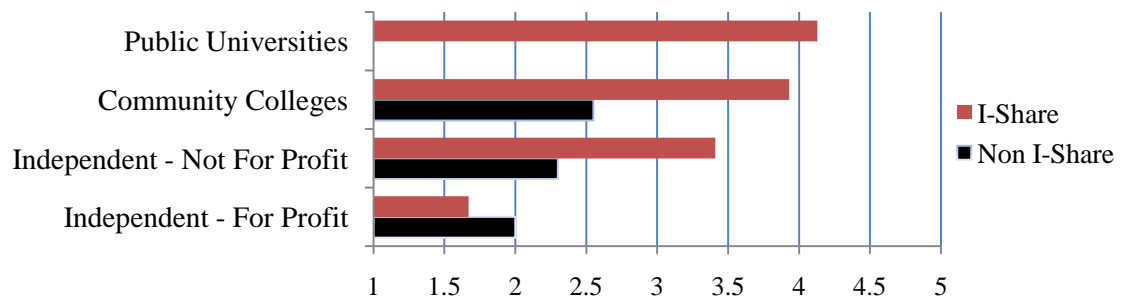


Figure 11. The I-Share Benefit to Participate in I-Share Committees and Task Forces

Table 25 presents the level of importance to participate in the Lanter delivery system. I-Share public university libraries considered this benefit as “Very Important”, while all other I-Share library types viewed this benefit as “Important”.

Table 25

The I-Share Benefit to Participate in the Lanter Delivery System

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	0 0.0%	8 100.0%	5.00
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	2 14.3%	12 85.7%	4.86
Independent – Not For Profit	27	1 3.7%	0 0.0%	2 7.4%	2 7.4%	22 81.5%	4.63
Independent – For Profit	3	0 0.0%	0 0.0%	0 0.0%	1 33.3%	2 66.7%	4.67
Non I-Share							
Community Colleges	11	3 27.3%	0 0.0%	1 9.1%	3 27.3%	4 36.4%	3.45
Independent – Not For Profit	10	3 30.0%	0 0.0%	2 20.0%	1 10.0%	4 40.0%	3.30
Independent – For Profit	3	0 0.0%	2 66.7%	0 0.0%	1 33.3%	0 0.0%	2.67

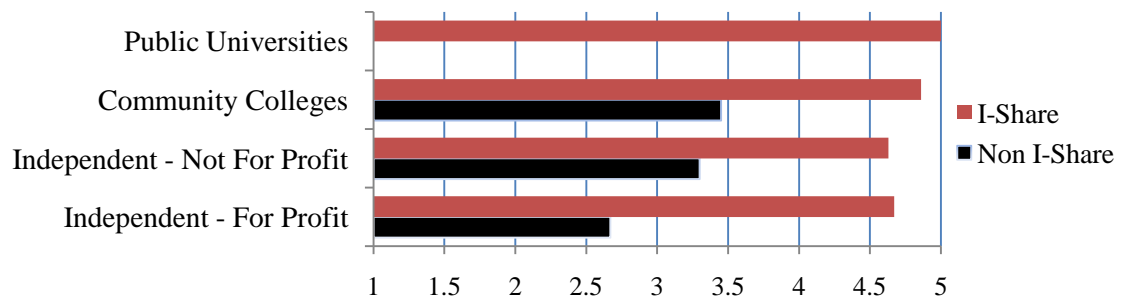


Figure 12. The I-Share Benefit to Participate in the Lanter Delivery System

Open-ended Question

The following is a summary of respondent answers to the statement, “Please share any comments about the benefits of I-Share participation for your library.” A total of 31 comments were received from all respondents, with 20 (64.5%) being from I-Share members and 11 (35.5%) from non I-Share members.

I-Share member responses. Among the 20 I-Share respondents, 3 (15.0%) were received from public university library directors, 6 (30.0%) from community college library directors, 10 (50.0%) from directors working in independent – not for profit institutions, and 1 (5.0%) from a library director at an independent – for profit institution.

Each of the three public university library directors offered a different advantage with I-Share membership. One director stated I-Share’s ability to offer patron-initiated borrowing to a large collection as essential. A second director mentioned value in terms of return on investment as an important advantage, and the third public university library director said that having access to a community of peers was an important advantage of I-Share membership.

Two advantages were offered from the six community college respondents. Four directors mentioned the benefit of resource sharing through a large collection – specifically the unmediated nature of patron-initiated borrowing. The second advantage given by two community college directors was the availability of technical support and training offered by CARLI staff.

With the 10 comments offered by independent – not for profit library directors, eight mentioned resource sharing as being the prime advantage to I-Share participation. Another director mentioned the aspect of being able to network with other libraries as

being important to their library. The last director from an independent – not for profit institution considered I-Share’s technical support as being a fundamental advantage.

The single library director from an independent – for profit institution that left a comment stated that I-Share’s delivery system and reciprocal borrowing were the most important advantages of I-Share membership for their library.

Non I-Share member responses. Among the 11 directors from non I-Share libraries that offered a response, 3 (27.3%) were from a community college, 7 (63.6%) were from an independent – not for profit institution, and 1 (9.0%) was from an independent – for profit institution.

Two of the three community college directors acknowledged resource sharing as being an advantage of I-Share however the costs to join I-Share were prohibitive. The third community college respondent stated that many of their students were developmental and that I-Share’s academically-focused collection would not be valuable to them. This director believed that keeping their community college library affiliated with a multi-type library system that included public libraries, rather than a strictly academic group of libraries such as I-Share, was a better fit for many of their students.

Of the seven comments received from directors at independent – not for profit institutions, five stated that migration costs to unbundle records from their current ILS and import them into I-Share’s Voyager ILS were too expensive. Another director indicated that they would be interested in joining I-Share if they could participate in interlibrary loan but not have to share an OPAC and ILS. The seventh director from an independent – not for profit institution indicated that their library did not do enough interlibrary loan to justify joining I-Share.

The single independent – for profit director stated that I-Share membership was better suited for areas in urban settings like Chicago that are concentrated with college and university students. Students in these more populated areas could visit other I-Share libraries unlike students attending colleges in suburban and rural settings.

Second Sub-question - Disadvantages of I-Share Participation

The following section presents findings that address the second sub-question of this study regarding the perceived disadvantages of I-Share participation. Closed-ended findings are presented first, followed by a summary of respondent answers to a concluding open-ended question.

Closed-ended Questions and Findings

The findings of the following seven questions represent the perceived disadvantages of I-Share participation by I-Share and non I-Share respondents. Each respondent was asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: “Strongly Agree”, “Agree”, “No Opinion”, “Disagree”, and “Strongly Disagree”. These answers are presented in the following tables as frequencies and percentages.

To numerically represent respondent answers, values ranging from one to five were assigned to the five Likert scale answer options to derive a mean score: “Strongly Agree”(1), “Agree”(2), “No Opinion”(3), “Disagree”(4), and “Strongly Disagree”(5). All findings in the following tables are bifurcated between I-Share and non I-Share respondents and further segmented by institution type. A bar chart follows each table to graphically illustrate findings.

Table 26 shows that I-Share libraries from public universities, and both I-Share and non I-Share community college libraries assigned a value of “Disagree” to the statement that sharing an integrated library system with other libraries is a disadvantage. All other library types had “No Opinion” that sharing an integrated library system is a disadvantage of I-Share participation.

Table 26

A Disadvantage of I-Share Participation is Sharing an Integrated Library System with Other Libraries

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	5 62.5%	3 37.5%	4.38
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	6 42.9%	8 57.1%	4.57
Independent – Not For Profit	27	0 0.0%	4 14.8%	1 3.7%	15 55.6%	7 25.9%	3.93
Independent – For Profit	3	1 33.3%	0 0.0%	1 33.3%	1 33.3%	0 0.0%	3.33
Non I-Share							
Community Colleges	12	0 0.0%	0 0.0%	2 16.7%	6 50.0%	4 33.3%	4.17
Independent – Not For Profit	10	1 10.0%	2 20.0%	1 10.0%	4 40.0%	2 20.0%	3.40
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	2 66.7%	0 0.0%	3.67

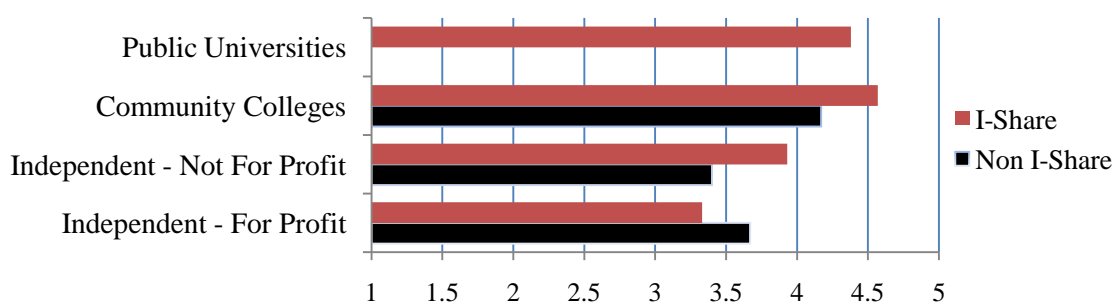


Figure 13. A Disadvantage of I-Share Participation is Sharing an Integrated Library System with Other Libraries

Table 27 shows the level of agreement that complying with I-Share cataloging standards and best practices is a disadvantage with I-Share participation. All I-Share library types replied to this statement with a value of “Disagree”.

Table 27

A Disadvantage of I-Share Participation is Complying with I-Share Cataloging Standards and Best Practices

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	0 0.0%	2 25.0%	5 62.5%	4.38
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	6 42.9%	8 57.1%	4.57
Independent – Not For Profit	27	0 0.0%	0 0.0%	4 14.8%	16 59.3%	7 25.9%	4.11
Independent – For Profit	3	0 0.0%	0 0.0%	0 0.0%	1 33.3%	2 66.7%	4.67
Non I-Share							
Community Colleges	12	0 0.0%	1 8.3%	3 25.0%	4 33.3%	4 33.3%	3.92
Independent – Not For Profit	10	0 0.0%	2 20.0%	1 10.0%	5 50.0%	2 20.0%	3.70
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	2 66.7%	0 0.0%	3.67

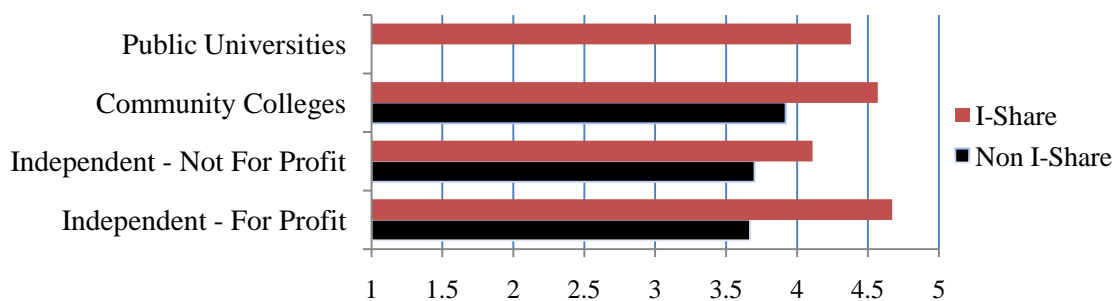


Figure 14. A Disadvantage of I-Share Participation is Complying with I-Share Cataloging Standards and Best Practices

Table 28 shows that all non I-Share library types had “No Opinion” that complying with I-Share resource sharing policies is a disadvantage. All I-Share library types answered this statement with a value of “Disagree”.

Table 28

A Disadvantage of I-Share Participation is Complying with I-Share Resource Sharing Policies

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	1 12.0%	1 15.0%	5 62.5%	4.25
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	9 64.3%	5 35.7%	4.36
Independent – Not For Profit	27	0 0.0%	2 7.4%	3 11.1%	15 55.6%	7 25.9%	4.00
Independent – For Profit	3	0 0.0%	0 0.0%	0 0.0%	2 66.7%	1 33.3%	4.33
Non I-Share							
Community Colleges	12	0 0.0%	1 8.3%	3 25.0%	5 41.7%	3 25.0%	3.83
Independent – Not For Profit	10	0 0.0%	1 10.0%	1 10.0%	7 70.0%	1 10.0%	3.80
Independent – For Profit	3	0 0.0%	1 33.3%	1 33.3%	1 33.3%	0 0.0%	3.00

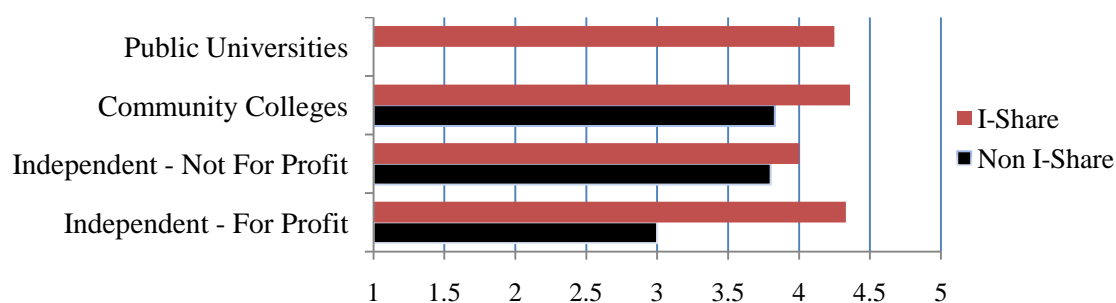


Figure 15. A Disadvantage of I-Share Participation is Complying with I-Share Resource Sharing Policies

Table 29 shows libraries at I-Share public universities, community colleges, and independent – for profit institutions assigned a value of “Disagree” to the statement that complying with I-Share standards for managing patron data is a disadvantage of I-Share.

Table 29

A Disadvantage of I-Share Participation is Complying with I-Share Standards for Managing Patron Data

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	0 0.0%	4 50.0%	3 37.5%	4.13
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	7 50.0%	7 50.0%	4.50
Independent – Not For Profit	27	0 0.0%	3 11.1%	5 18.5%	15 55.6%	4 14.8%	3.74
Independent – For Profit	3	0 0.0%	0 0.0%	0 0.0%	2 66.7%	1 33.3%	4.33
Non I-Share							
Community Colleges	12	0 0.0%	1 8.3%	2 16.7%	8 66.7%	1 8.3%	3.75
Independent – Not For Profit	10	0 0.0%	2 20.0%	4 40.0%	4 40.0%	0 0.0%	3.20
Independent – For Profit	3	0 0.0%	0 0.0%	2 66.7%	1 33.3%	0 0.0%	3.33

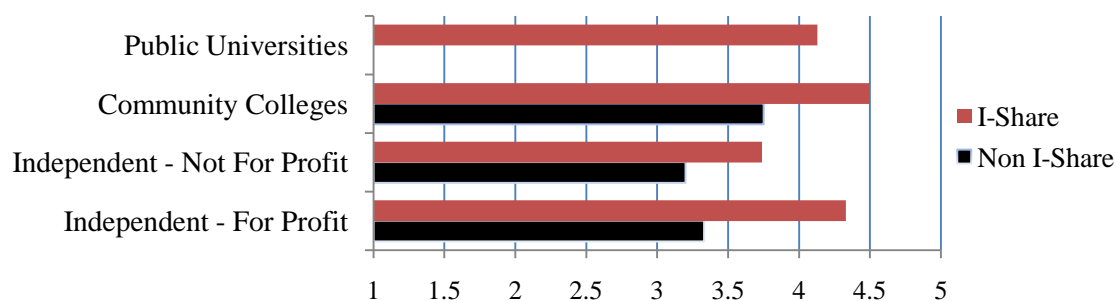


Figure 16. A Disadvantage of I-Share Participation is Complying with I-Share Standards for Managing Patron Data

Table 30 shows that libraries from non I-Share independent – not for profit institutions, independent – for profit institutions, and I-Share independent – not for profit institutions had “No Opinion” that increased local lending is a disadvantage of I-Share.

Table 30

A Disadvantage of I-Share Participation is Increased Lending of Local Collections

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	6	0 0.0%	0 0.0%	0 0.0%	3 50.0%	3 50.0%	4.50
Community Colleges	14	0 0.0%	0 0.0%	1 7.1%	5 35.7%	8 57.1%	4.50
Independent – Not For Profit	26	0 0.0%	2 7.7%	3 11.5%	15 57.7%	6 23.1%	3.96
Independent – For Profit	3	0 0.0%	0 0.0%	0 0.0%	1 33.3%	2 66.7%	4.67
Non I-Share							
Community Colleges	12	0 0.0%	1 8.3%	2 16.7%	5 41.7%	4 33.3%	4.00
Independent – Not For Profit	10	0 0.0%	2 20.0%	2 20.0%	6 60.0%	0 0.0%	3.40
Independent – For Profit	3	0 0.0%	1 33.3%	1 33.3%	1 33.3%	0 0.0%	3.00

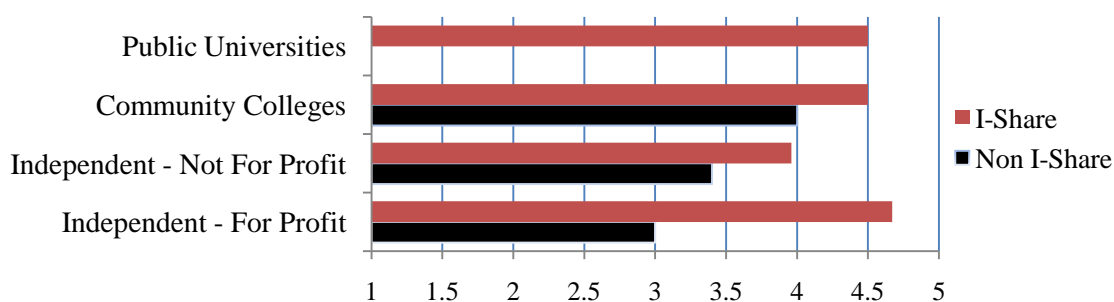


Figure 17. A Disadvantage of I-Share Participation is Increased Lending of Local Collections

Table 31 shows non I-Share libraries from independent – for profit institutions gave a value of “Agree” that the need to change workflows is a disadvantage of I-Share. I-Share public universities and independent – for profit libraries replied with “Disagree”.

Table 31

A Disadvantage of I-Share Participation is the Need to Change Library Workflows

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	1 12.5%	3 37.5%	3 37.5%	4.00
Community Colleges	14	0 0.0%	2 14.3%	0 0.0%	9 64.3%	3 21.4%	3.93
Independent – Not For Profit	27	1 3.7%	1 3.7%	5 18.5%	12 44.4%	8 29.6%	3.93
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	1 33.3%	1 33.3%	4.00
Non I-Share							
Community Colleges	12	1 8.3%	3 25.0%	1 8.3%	6 50.0%	1 8.3%	3.25
Independent – Not For Profit	10	0 0.0%	2 20.0%	2 20.0%	6 60.0%	0 0.0%	3.40
Independent – For Profit	3	1 33.3%	0 0.0%	2 66.7%	0 0.0%	0 0.0%	2.33

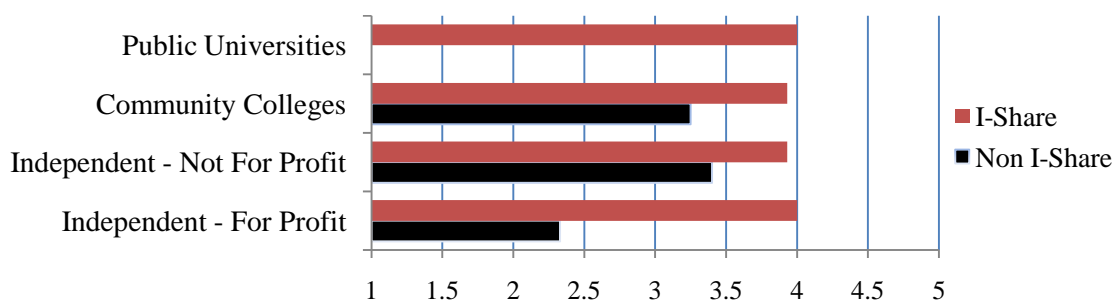


Figure 18. A Disadvantage of I-Share Participation is the Need to Change Library Workflows

Table 32 shows that non I-Share libraries from independent – for profit institutions assigned a value of “Agree” to the statement that less contact with other consortia and library systems is a disadvantage of I-Share.

Table 32

A Disadvantage of I-Share Participation is Less Contact with Other Consortia and Library Systems

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	2 25.5%	5 62.5%	4.50
Community Colleges	14	0 0.0%	1 7.1%	0 0.0%	8 57.1%	5 35.7%	4.21
Independent – Not For Profit	27	0 0.0%	1 3.7%	5 18.5%	16 59.3%	5 18.5%	3.93
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	1 33.3%	1 33.3%	3.67
Non I-Share							
Community Colleges	12	2 16.7%	3 25.0%	2 16.7%	3 25.0%	2 16.7%	3.00
Independent – Not For Profit	10	1 10.0%	0 0.0%	2 20.0%	6 60.0%	1 10.0%	3.60
Independent – For Profit	3	0 0.0%	1 33.3%	2 66.7%	0 0.0%	0 0.0%	2.67

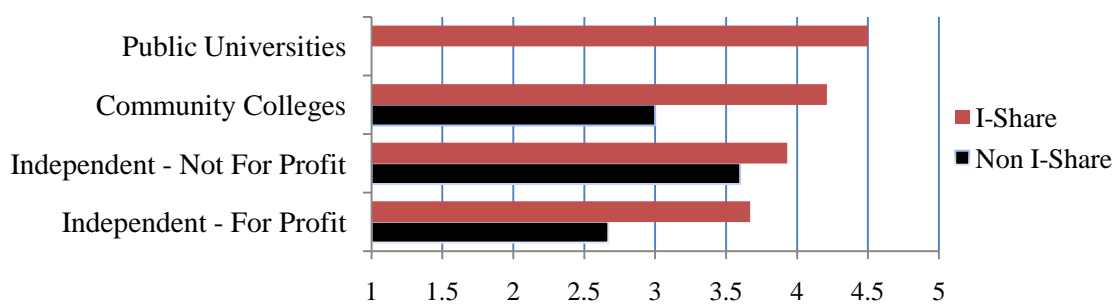


Figure 19. A Disadvantage of I-Share Participation is Less Contact with Other Consortia and Library Systems

Open-ended Question

The following is a summary of respondent comments to the statement, “Please share any comments about the disadvantages of I-Share participation for your library.” A total of 22 comments were received from all respondents, with 14 (63.6%) being from I-Share members and 8 (36.4%) from non I-Share members.

I-Share member responses. Among the 14 responses received by I-Share members, 2 (14.3%) were from public universities, 2 (14.3%) from community colleges, and 10 (71.4%) from independent – not for profit institutions. There were no responses from directors at independent - for profit institutions.

Both public university respondents suggested that there are no disadvantages with I-Share membership, but only advantages. Among the advantages are lower costs and access to a large academically-focused collection. One public university library director stated that any need to comply with I-Share standards has been beneficial over time. Another director suggested that their library could not function without access to the collective collections of I-Share libraries.

As with the public university respondents, both community college library directors echoed the theme that there are no disadvantages with I-Share membership. One community college library director said that any changes to local workflows are small in comparison to the benefits of sharing a large collection. The second community college director mentioned the need to be flexible and not rooted in traditional ways of doing things. This director continued by saying the uniformity of the Voyager catalog being used at their community college and other I-Share institutions was an important decision to join I-Share because of the high number of transfer students at their institution.

Among the 10 independent – not for profit responses, nine directors repeated the theme that I-Share membership does not have any disadvantages. Three directors stated that they understood the level of frustration felt by current non I-Share members who have not been able to enroll. One director stated that I-Share's lack of centralized authority control was a disadvantage. The concern expressed by this director was that the quality of bibliographic records being entered into Voyager was becoming an issue as a result of poor training among other I-Share libraries.

Non I-Share member responses. Among the 8 responses given by non I-Share members, 2 (25.0%) were from community colleges, 5 (62.5%) from independent – not for profit institutions, and 1 (12.5%) from an independent – for profit institution.

Summarizing the comments given by the two community college respondents, one director stated that they considered membership in their current multi-type consortium as being better suited for the needs of their students – particularly those that were developmental. The second director stated that they did not wish to be an I-Share member because they feared that they would not receive the same level of service as currently received from their local multi-type library system.

Five comments were given by library directors from independent – not for profit institutions. Two directors said the disadvantages of I-Share membership outweigh the advantages – specifically the issue of losing local control over policies. Another director mentioned their dislike for the Voyager ILS and felt it had limitations working in a shared environment with many libraries. The fourth director mentioned the cost to

migrate records into Voyager as a disadvantage. The fifth respondent stated that enrollment had not been open for their library.

The single director from an independent- for profit institution listed three disadvantages with I-Share: prohibitive costs, deficiencies with the Voyager ILS, and the lack of centralized cataloging control. Collectively, these disadvantages did not make I-Share membership an attractive option to move from their current ILS.

Third Sub-question - Obstacles to I-Share Participation

The following section presents findings that address the third sub-question of this study regarding the perceived obstacles to I-Share participation. Closed-ended findings are presented first, followed by a summary of respondent answers to a concluding open-ended question.

Closed-ended Questions and Findings

The findings of the following nine questions represent the perceived obstacles to I-Share participation by I-Share and non I-Share respondents. Each respondent was asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: “Strongly Agree”, “Agree”, “No Opinion”, “Disagree”, and “Strongly Disagree”. These answers are presented in the following tables as frequencies and percentages.

To numerically represent respondent answers, values ranging from one to five were assigned to the five Likert scale answer options to derive a mean score: “Strongly Agree”(1), “Agree”(2), “No Opinion”(3), “Disagree”(4), and “Strongly Disagree”(5). All findings in the following tables are bifurcated between I-Share and non I-Share

respondents and further segmented by institution type. A bar chart follows each table to graphically illustrate findings.

Table 33 shows that non I-Share libraries from independent – not for profit institutions assigned a value of “Strongly Agree” to the statement that an obstacle to I-Share participation is the infrequency of open enrollment periods. Non I-Share community colleges and independent – for profit institutions, and I-Share libraries from community colleges and independent – not for profit institutions, gave a value of “Agree”.

Table 33

An Obstacle to I-Share Participation is the Infrequency of Open Enrollment Periods

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	3 37.5%	3 37.5%	1 12.5%	1 12.5%	3.00
Community Colleges	14	0 0.0%	7 50.0%	4 28.6%	3 21.4%	0 0.0%	2.71
Independent – Not For Profit	27	2 7.4%	5 18.5%	14 51.9%	5 18.5%	1 3.7%	2.93
Independent – For Profit	3	0 0.0%	0 0.0%	2 66.7%	0 0.0%	1 33.3%	3.67
Non I-Share							
Community Colleges	12	4 33.3%	2 16.7%	4 33.3%	2 16.7%	0 0.0%	2.33
Independent – Not For Profit	10	5 50.0%	3 30.0%	0 0.0%	2 20.0%	0 0.0%	1.90
Independent – For Profit	3	1 33.3%	1 33.3%	1 33.3%	0 0.0%	0 0.0%	2.00

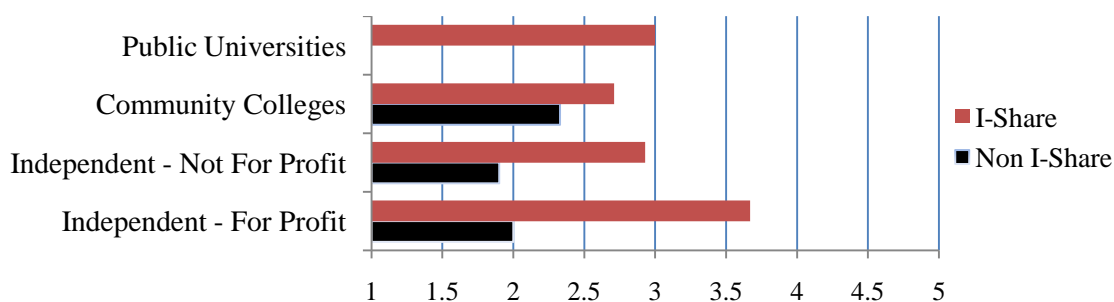


Figure 20. An Obstacle to I-Share Participation is the Infrequency of Open Enrollment Periods

Table 34 presents the level of agreement that an obstacle to I-Share participation is the lack of communication about open enrollment periods. All I-Share library types had “No Opinion” about this statement. All non I-Share library responded with “Agree”.

Table 34

An Obstacle to I-Share Participation is the Lack of Communication about Open Enrollment Periods

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	5 62.5%	1 12.5%	2 25.5%	3.63
Community Colleges	14	0 0.0%	2 14.3%	3 21.4%	7 50.0%	2 14.3%	3.64
Independent – Not For Profit	27	1 3.7%	0 0.0%	14 51.9%	10 37.0%	2 7.4%	3.44
Independent – For Profit	3	0 0.0%	0 0.0%	2 66.7%	0 0.0%	1 33.3%	3.67
Non I-Share							
Community Colleges	12	1 8.3%	3 25.0%	5 41.7%	2 16.7%	1 8.3%	2.92
Independent – Not For Profit	10	2 20.0%	3 30.0%	2 20.0%	3 30.0%	0 0.0%	2.60
Independent – For Profit	3	0 0.0%	1 33.3%	2 66.7%	0 0.0%	0 0.0%	2.67

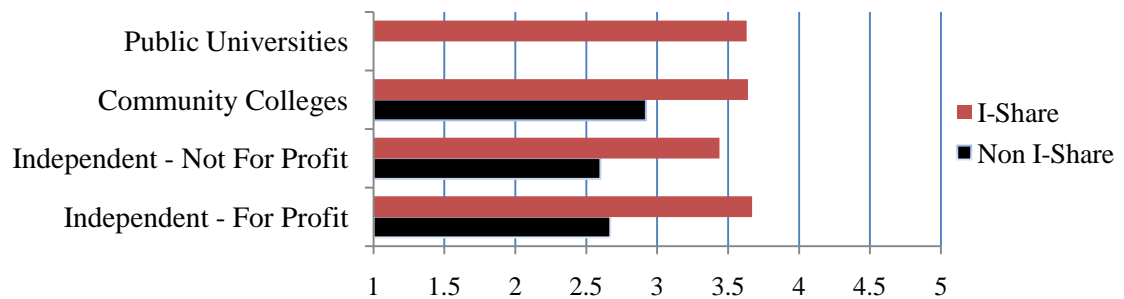


Figure 21. An Obstacle to I-Share Participation is the Lack of Communication about Open Enrollment Periods

Table 35 presents the level of agreement that an obstacle to I-Share participation is the annual assessment fee. I-Share libraries from public universities and independent – for profit institutions assigned a value of “Disagree” to this statement.

Table 35

An Obstacle to I-Share Participation is the Annual Assessment Fee

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	2 25.0%	0 0.0%	5 62.5%	4.13
Community Colleges	14	0 0.0%	2 14.3%	1 7.1%	7 50.0%	4 28.6%	3.93
Independent – Not For Profit	26	0 0.0%	2 7.7%	4 15.4%	16 61.5%	4 15.4%	3.85
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	1 33.3%	1 33.3%	4.00
Non I-Share							
Community Colleges	12	1 8.3%	5 41.7%	2 16.7%	3 25.0%	1 8.3%	2.83
Independent – Not For Profit	10	1 10.0%	2 20.0%	4 40.0%	2 20.0%	1 10.0%	3.00
Independent – For Profit	3	1 33.3%	1 33.3%	1 33.3%	0 0.0%	0 0.0%	2.00

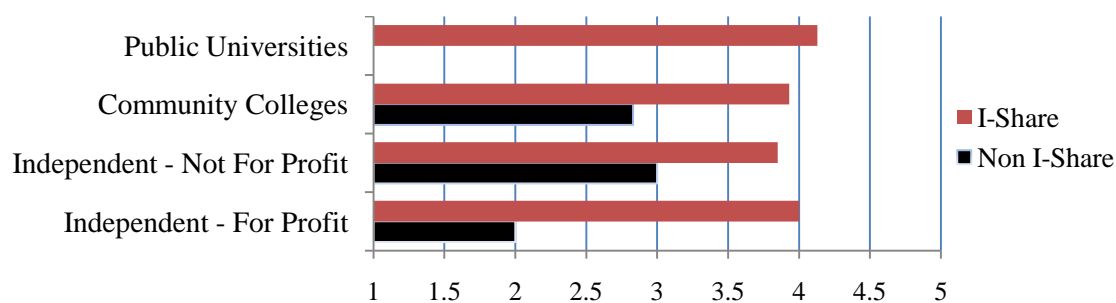


Figure 22. An Obstacle to I-Share Participation is the Annual Assessment Fee

Table 36 shows that non I-Share libraries from independent – for profit institutions assigned a value of “Strongly Agree” to the statement that the cost to migrate records from a current integrated library system is an obstacle to joining I-Share.

Table 36

An Obstacle to I-Share Participation is the Cost to Migrate Local Records from a Current Integrated Library System

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	3 37.5%	3 37.5%	2 25.0%	3.88
Community Colleges	14	0 0.0%	2 14.3%	4 28.6%	7 50.0%	1 7.1%	3.50
Independent – Not For Profit	26	1 3.8%	3 11.5%	10 38.5%	11 42.3%	1 3.8%	3.31
Independent – For Profit	3	1 33.3%	1 33.3%	1 33.3%	0 0.0%	0 0.0%	2.00
Non I-Share							
Community Colleges	12	3 25.0%	5 41.7%	3 25.0%	1 8.3%	0 0.0%	2.17
Independent – Not For Profit	9	2 22.2%	0 0.0%	4 44.4%	3 33.3%	0 0.0%	2.89
Independent – For Profit	3	1 33.3%	2 66.7%	0 0.0%	0 0.0%	0 0.0%	1.67

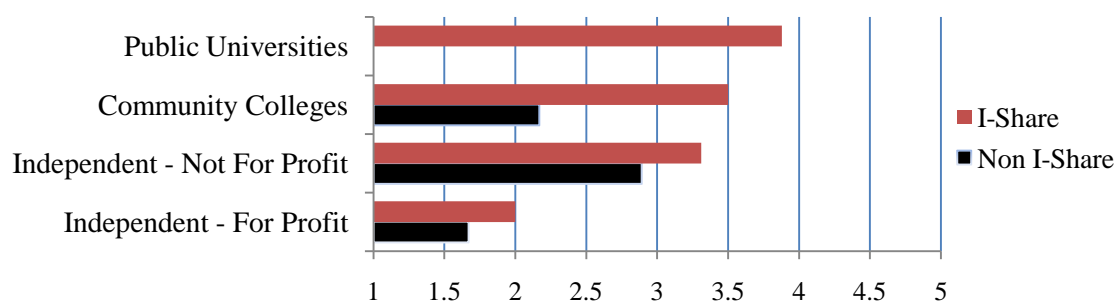


Figure 23. An Obstacle to I-Share Participation is the Cost to Migrate Local Records from a Current Integrated Library System

Table 37 shows all library types, except I-Share public universities and non I-Share community colleges, gave a value of “Disagree” that the I-Share requirement that bibliographic records be in MARC format is an obstacle to joining I-Share.

Table 37

An Obstacle to I-Share Participation is the I-Share Standard that Local Bibliographic Records be in MARC Format

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	3 37.5%	1 12.5%	3 37.5%	3.75
Community Colleges	14	0 0.0%	0 0.0%	2 14.3%	10 71.4%	2 14.3%	4.00
Independent – Not For Profit	27	0 0.0%	1 3.7%	3 11.1%	17 63.0%	6 22.2%	4.04
Independent – For Profit	3	0 0.0%	0 0.0%	0 0.0%	1 33.3%	2 66.7%	4.67
Non I-Share							
Community Colleges	11	0 0.0%	0 0.0%	3 27.3%	6 54.5%	2 18.2%	3.91
Independent – Not For Profit	10	0 0.0%	0 0.0%	0 0.0%	7 70.0%	3 30.0%	4.30
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	1 33.3%	1 33.3%	4.00

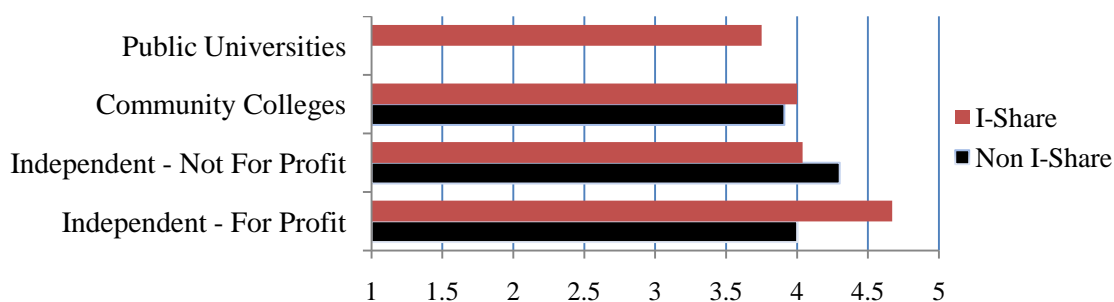


Figure 24. An Obstacle to I-Share Participation is the I-Share Standard that Local Bibliographic Records be in MARC Format

Table 38 presents the level of agreement that an obstacle to I-Share participation is complying with I-Share standards for local technology. Non I-Share libraries from independent – for profit institutions gave a value of “Agree” to this statement.

Table 38

An Obstacle to I-Share Participation is Complying with I-Share Standards for Local Technology

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	5 62.5%	2 25.0%	4.13
Community Colleges	14	0 0.0%	0 0.0%	3 21.4%	7 50.0%	4 28.6%	4.07
Independent – Not For Profit	27	0 0.0%	3 11.1%	4 14.8%	16 59.3%	4 14.8%	3.78
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	1 33.3%	1 33.3%	3.67
Non I-Share							
Community Colleges	12	1 8.3%	1 8.3%	4 33.3%	6 50.0%	0 0.0%	3.25
Independent – Not For Profit	10	0 0.0%	0 0.0%	3 30.0%	7 70.0%	0 0.0%	3.70
Independent – For Profit	3	0 0.0%	2 66.7%	1 33.3%	0 0.0%	0 0.0%	2.33

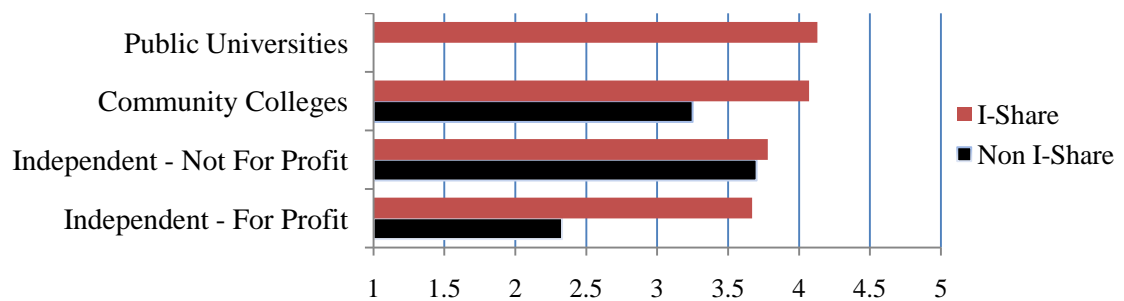


Figure 25. An Obstacle to I-Share Participation is Complying with I-Share Standards for Local Technology

Table 39 shows that I-Share public universities and community colleges assigned a value of “Disagree” that the requirement for continuing education and training is an obstacle to I-Share participation. All other library types had “No Opinion”.

Table 39

An Obstacle to I-Share Participation is the Requirement of Continuing Education and Training for Staff

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	2 25.0%	1 12.5%	5 62.5%	4.38
Community Colleges	14	0 0.0%	0 0.0%	1 7.1%	9 64.3%	4 28.6%	4.21
Independent – Not For Profit	26	0 0.0%	2 7.7%	4 15.4%	16 61.5%	4 15.4%	3.85
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	2 66.7%	0 0.0%	3.33
Non I-Share							
Community Colleges	12	1 8.3%	3 25.0%	1 8.3%	5 41.7%	2 16.7%	3.33
Independent – Not For Profit	10	0 0.0%	0 0.0%	4 40.0%	4 40.0%	2 20.0%	3.80
Independent – For Profit	3	0 0.0%	0 0.0%	2 66.7%	1 33.3%	0 0.0%	3.33

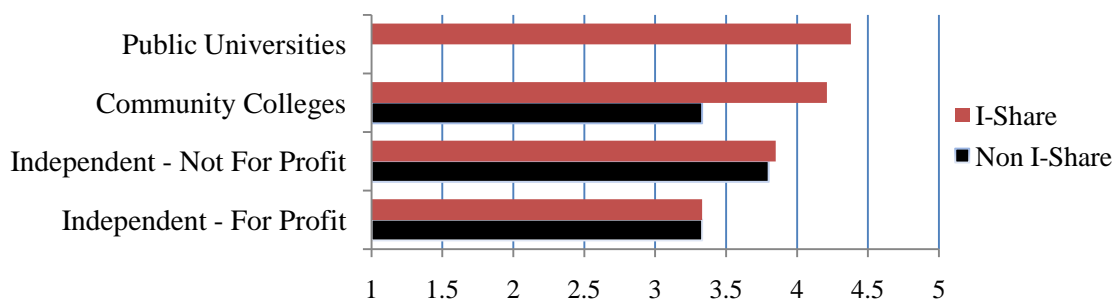


Figure 26. An Obstacle to I-Share Participation is the Requirement of Continuing Education and Training for Staff

Table 40 presents the level of agreement that an obstacle to I-Share participation is the expectation to actively participate in meetings and training events. Libraries from non I-Share independent –for profit institutions gave a value of “Agree” to this statement.

Table 40

An Obstacle to I-Share Participation is the Expectation to Actively Participate in Meetings and Training Events

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	2 25.0%	5 62.5%	4.50
Community Colleges	14	0 0.0%	1 7.1%	2 14.3%	7 50.0%	4 28.6%	4.00
Independent – Not For Profit	27	0 0.0%	4 14.8%	3 11.1%	16 59.3%	4 14.8%	3.74
Independent – For Profit	3	0 0.0%	0 0.0%	2 66.7%	1 33.3%	0 0.0%	3.33
Non I-Share							
Community Colleges	12	1 8.3%	4 33.3%	2 16.7%	3 25.0%	2 16.7%	3.08
Independent – Not For Profit	10	0 0.0%	1 10.0%	3 30.0%	5 50.0%	1 10.0%	3.60
Independent – For Profit	3	0 0.0%	2 66.7%	1 33.3%	0 0.0%	0 0.0%	2.33

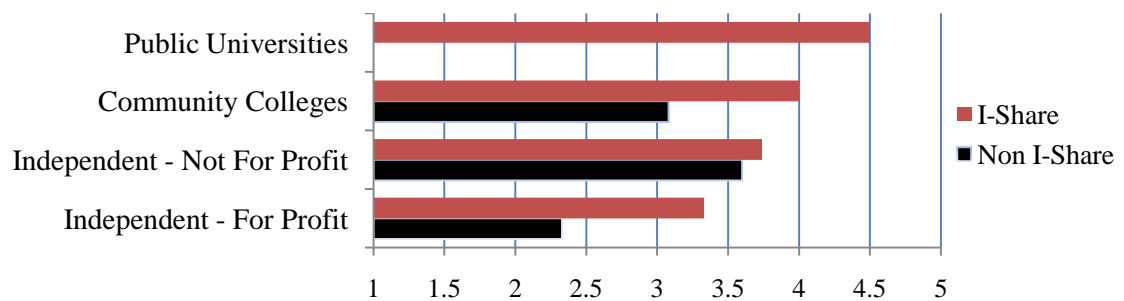


Figure 27. An Obstacle to I-Share Participation is the Expectation to Actively Participate in Meetings and Training Events

Table 41 presents the level of agreement that an obstacle to I-Share participation is CARLI's current governance structure. I-Share community college libraries responded to this statement with a value of "Disagree". All other library types had "No Opinion".

Table 41

An Obstacle to I-Share Participation is CARLI's Current Governance Structure

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	1 12.5%	2 25.0%	2 25.0%	3 37.5%	3.88
Community Colleges	14	0 0.0%	0 0.0%	2 14.3%	9 64.3%	3 21.4%	4.07
Independent – Not For Profit	27	1 3.7%	3 11.1%	3 11.1%	15 55.6%	5 18.5%	3.74
Independent – For Profit	3	0 0.0%	0 0.0%	2 66.7%	1 33.3%	0 0.0%	3.33
Non I-Share							
Community Colleges	11	0 0.0%	0 0.0%	6 54.5%	3 27.3%	2 18.2%	3.64
Independent – Not For Profit	9	0 0.0%	0 0.0%	3 33.3%	5 55.6%	1 11.1%	3.78
Independent – For Profit	3	0 0.0%	0 0.0%	3 100.0%	0 0.0%	0 0.0%	3.00

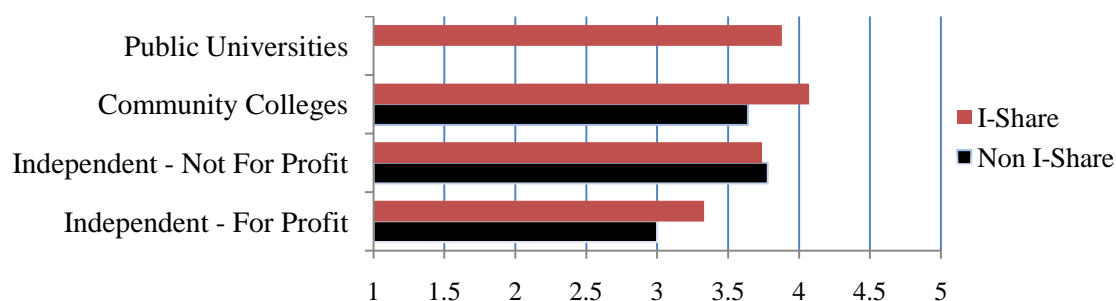


Figure 28. An Obstacle to I-Share Participation is CARLI's Current Governance Structure

Open-ended Question

The following is a summary of respondent answers to the statement, “Please share any comments about the obstacles to participating in I-Share for your library.” A total of 25 comments were received from all respondents, with 19 (76.0%) being from I-Share members and 6 (24.0%) from non I-Share members.

I-Share member responses. Among the 19 responses received by I-Share members, 2 (10.5%) were from public universities, 2 (10.5%) from community colleges, and 15 (78.9%) from independent – not for profit institutions. There were no comments given by I-Share directors from independent – for profit institutions.

Two different comments were given by the two public university library directors. The first director stated that this section [obstacles] wasn’t relevant since they had been an I-Share library for many years. The second director suggested that too many non I-Share libraries worry about local control issues and that shared control by professionals, such as I-Share staff at CARLI, is usually a better decision. This director continued by stating that many non I-Share libraries are fearful of joining I-Share and refuse to join to the detriment of their students.

Both community college library directors indicated that start up costs to join I-Share are worth the price. One director characterized joining I-Share as an investment, and something community college libraries need to realize. The second community college director suggested that community college librarians have been too parochial in how they view their libraries – opting to stay with local public library systems rather than move into shared collections with other colleges and universities.

Of the 15 responses received from independent – not for profit institutions, seven directors mentioned the lack of enrollment periods as being an obstacle. Of these seven, one director identified as being an I-Share member for many years expressed frustration at CARLI's reluctance to open enrollment to other schools that would benefit from I-Share membership. This director continued by stating that they may leave I-Share if enrollment is opened soon.

Continuing with comments given by directors from independent - not for profit institutions, four directors suggested migration fees as being too expensive for many libraries to absorb. The one-time costs involved with unbundling records from a current ILS are too much to handle. Three directors stated that there were no obstacles to I-Share participation. A final comment suggested that participation in CARLI committees is too difficult for libraries with a small staff.

Non I-Share member responses. Of the six comments given by non I-Share participants, one (16.7%) was received from a community college, four (66.7%) from independent – not for profit institutions, and one (16.7%) from an independent – for profit institution.

The single community college respondent indicated that they did not know enough about I-Share to judge its advantages and disadvantages. They continued by stating that their current limited staffing precludes making any changes that might create more work than any benefits would warrant.

Three of the four independent – not for profit library directors indicated that the lack of open enrollment periods has been their biggest obstacle. The fourth independent –

not for profit respondent stated that the costs to migrate from their current ILS to I-Share was a major obstacle.

The single independent – for profit respondent stated that the Voyager ILS was an obstacle and that they preferred to stay with their local in-house ILS. Specifically mentioned was Voyager’s inability to handle automated processes like check-in functions, and that it was not well-suited for supporting branch locations.

Tests for Statistical Difference in Answers to Sub-questions

This section presents data regarding the statistical difference between all I-Share and non I-Share responses to the three sub-questions of this study. An independent samples t-test compared numeric values ranging from one to five that corresponded to the five Likert scale answer options given for each closed-ended question. Results were segmented by institution type with corresponding *P* (2-tailed) values. A 95% confidence interval was used for each test. Because there were no respondents from non I-Share public universities in this survey, only the mean value is given for public universities.

Table 42 presents the statistical difference between all I-Share and non I-Share closed-ended responses to the 10 questions regarding the advantages of I-Share participation (Tables 16 through 25). The difference in responses given by I-Share and non I-Share community college directors ($p < 0.0001$) was statistically significant as was the difference in answers given by library directors from independent – not for profit institutions ($p < 0.0001$). The difference between I-Share and non I-Share answers given by library directors from independent – for profit institutions ($p = 0.1514$) was not statistically significant. The cumulative difference between I-Share and non I-Share responses from library directors of all institution types ($p < 0.0001$) was also statistically significant.

Table 42

Difference in Total Responses to the Benefits of I-Share Participation

	I-Share N	I-Share Mean	Non I-Share N	Non I-Share Mean	t statistic	<i>P</i> (2-tailed)
Public Universities	80	4.46 (0.8)	-----	-----	-----	-----
Community Colleges	139	4.53 (0.7)	115	3.48 (1.2)	8.84	< 0.0001
Independent – Not For Profit	268	4.11 (1.1)	99	3.22 (1.3)	6.59	< 0.0001
Independent – For Profit	28	3.39 (1.7)	30	2.87 (1.0)	1.45	0.1514
All Institution Types	515	4.24 (1.0)	244	3.30 (1.2)	11.05	< 0.0001

Table 43 presents the difference between all I-Share and non I-Share closed-ended responses to the disadvantages of I-Share participation (Tables 26 through 32). Community colleges ($p < 0.0001$), independent – not for profit institutions ($p = 0.0004$), and independent – for profit institutions ($p = 0.0010$) all had a statistically significant difference between I-Share and non I-Share responses. The cumulative difference between I-Share and non I-Share responses from all institution types ($p < 0.0001$) was also statistically significant.

Table 43

Difference in Total Responses to the Disadvantages of I-Share Participation

	I-Share N	I-Share Mean	Non I-Share N	Non I-Share Mean	t statistic	<i>P</i> (2-tailed)
Public Universities	54	4.30 (0.9)	-----	-----	-----	-----
Community Colleges	98	4.38 (0.8)	84	3.70 (1.1)	5.21	< 0.0001
Independent – Not For Profit	188	3.94 (0.8)	70	3.50 (1.0)	3.62	0.0004
Independent – For Profit	21	4.14 (1.1)	21	3.10 (0.8)	3.56	0.0010
All Institution Types	361	4.12 (0.9)	175	3.55 (1.0)	6.98	< 0.0001

Table 44 presents the statistical difference between all I-Share and non I-Share closed-ended responses to the obstacles to I-Share participation (Tables 33 through 41). Community colleges ($p < 0.0001$), independent – not for profit institutions ($p = 0.0045$), and independent – for profit institutions ($p = 0.0012$) all had a statistically significant difference between I-Share and non I-Share responses. The cumulative difference between I-Share and non I-Share responses from all institution types ($p < 0.0001$) was also statistically significant.

Table 44

Difference in Total Responses to the Obstacles to I-Share Participation

	I-Share N	I-Share Mean	Non I-Share N	Non I-Share Mean	t statistic	<i>P</i> (2-tailed)
Public Universities	72	3.92 (1.0)	-----	-----	-----	-----
Community Colleges	126	3.79 (0.9)	106	3.04 (1.2)	5.63	< 0.0001
Independent – Not For Profit	240	3.63 (0.9)	88	3.28 (1.1)	2.86	0.0045
Independent – For Profit	27	3.56 (1.1)	27	2.59 (0.9)	3.43	0.0012
All Institution Types	465	3.71 (0.9)	221	3.08 (1.1)	7.71	< 0.0001

Responses to the Primary Research Question

This section addresses the primary research question of this study through three closed-ended and two open-ended questions. A restatement of the primary research questions follows:

What are the factors that influence an academic library director's decision to join, or not join, a statewide academic library consortium sharing a common integrated library system?

Findings from closed-ended questions are presented in tables and graphically illustrated with bar charts. A summary of respondent answers to two concluding open-ended questions related to the primary research question are presented by I-Share and non I-Share member responses.

Closed-ended Questions and Findings

The findings of the following three closed-ended questions rank the influence of I-Share advantages, disadvantages, and obstacles upon a decision to join I-Share. Each respondent was asked to select one answer for each question. Answer options were based on a Likert scale and consisted of five options: “Not Important”, “Slightly Important”, “Somewhat Important”, “Important”, and “Very Important” for the first question, and “Strongly Agree”, “Agree”, “No Opinion”, “Disagree”, and “Strongly Disagree” for the second and third question. These answers are presented in the following tables as frequencies and percentages.

To numerically represent respondent answers, values ranging from one to five were assigned to the five Likert scale answer options to derive a mean score: “Not Important”(1) , “Slightly Important”(2), “Somewhat Important”(3), “Important”(4), and “Very Important”(5) for the first question, and “Strongly Agree”(1), “Agree”(2), “No Opinion”(3), “Disagree”(4), and “Strongly Disagree”(5) for the second and third question. All findings in the following tables are bifurcated between I-Share and non I-Share respondents and further segmented by institution type. A bar chart follows each table to graphically illustrate findings.

Table 45 presents the findings of the question asking about the importance of I-Share benefits in the decision to join I-Share. Libraries from I-Share public universities and community colleges responded to this question with a value of “Very Important”. I-Share independent – not for profit and independent –for profit institutions rated I-Share benefits as “Important”. All non I-Share library types assigned a value of “Somewhat Important” to I-Share benefits in the decision to join I-Share.

Table 45

How Would You Rate the Importance of I-Share Benefits in Your Decision to Join to I-Share?

	N	Not Important 1	Slightly Important 2	Somewhat Important 3	Important 4	Very Important 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	0 0.0%	0 0.0%	8 100.0%	5.00
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	0 0.0%	14 100.0%	5.00
Independent – Not For Profit	27	0 0.0%	1 3.7%	0 0.0%	5 18.5%	21 77.8%	4.70
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	0 0.0%	2 66.7%	4.33
Non I-Share							
Community Colleges	12	0 0.0%	2 16.7%	2 16.7%	6 50.0%	2 16.7%	3.67
Independent – Not For Profit	10	0 0.0%	1 10.0%	3 30.0%	2 20.0%	4 40.0%	3.90
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	2 67.7%	0 0.0%	3.33

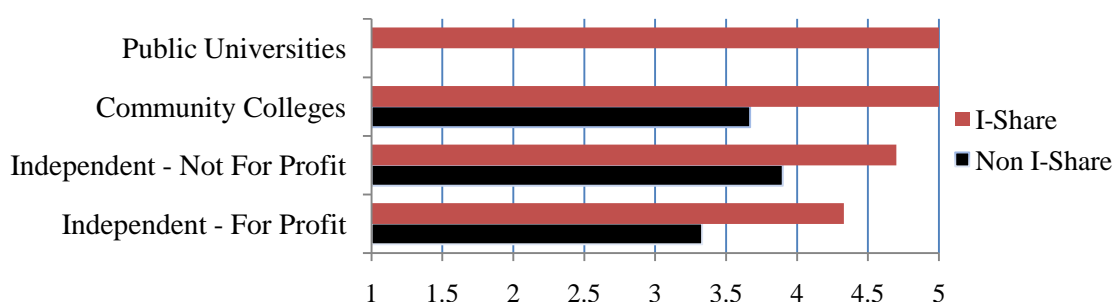


Figure 29. How Would You Rate the Importance of I-Share Benefits in Your Decision to Join to I-Share?

Table 46 shows all I-Share library types, except those from independent – for profit institutions, assigned a value of “Disagree” to the question that disadvantages with I-Share had influenced their decision to join. All other library types had “No Opinion”.

Table 46

Have I-Share Disadvantages Influenced Your Decision to Join I-Share?

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	1 12.5%	1 12.5%	6 75.0%	4.63
Community Colleges	14	0 0.0%	0 0.0%	0 0.0%	7 50.0%	7 50.0%	4.50
Independent – Not For Profit	25	0 0.0%	0 0.0%	6 24.0%	6 24.0%	13 52.0%	4.28
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	1 33.3%	1 33.3%	3.67
Non I-Share							
Community Colleges	12	0 0.0%	3 25.0%	3 25.0%	6 50.0%	0 0.0%	3.25
Independent – Not For Profit	10	1 10.0%	2 20.0%	0 0.0%	4 40.0%	3 30.0%	3.60
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	1 33.3%	1 33.3%	3.67

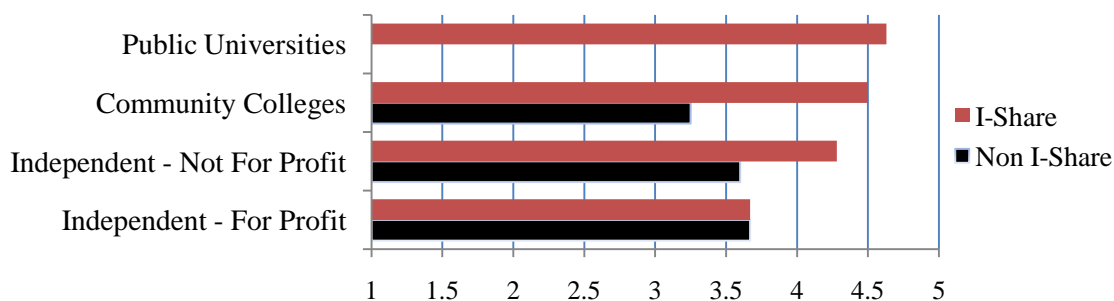


Figure 30. Have I-Share Disadvantages Influenced Your Decision to Join I-Share?

Table 47 shows the level of agreement that obstacles to I-Share participation have influenced the decision to join I-Share. Non I-Share independent – not for profit institutions replied with “Agree”. All I-Share library types responded with “Disagree”.

Table 47

Have Obstacles to I-Share Participation Influenced Your Decision to Join I-Share?

	N	Strongly Agree 1	Agree 2	No Opinion 3	Disagree 4	Strongly Disagree 5	Mean
I-Share							
Public Universities	8	0 0.0%	0 0.0%	3 37.5%	1 12.5%	4 50.0%	4.13
Community Colleges	14	0 0.0%	0 0.0%	1 7.1%	9 64.3%	4 28.6%	4.21
Independent – Not For Profit	25	0 0.0%	0 0.0%	6 24.0%	12 48.0%	7 28.0%	4.04
Independent – For Profit	3	0 0.0%	0 0.0%	1 33.3%	1 33.3%	1 33.3%	4.00
Non I-Share							
Community Colleges	12	0 0.0%	5 41.7%	2 16.7%	3 25.0%	2 16.7%	3.17
Independent – Not For Profit	10	4 40.0%	1 10.0%	0 0.0%	3 30.0%	2 20.0%	2.80
Independent – For Profit	3	0 0.0%	1 33.3%	0 0.0%	1 33.3%	1 33.3%	3.67

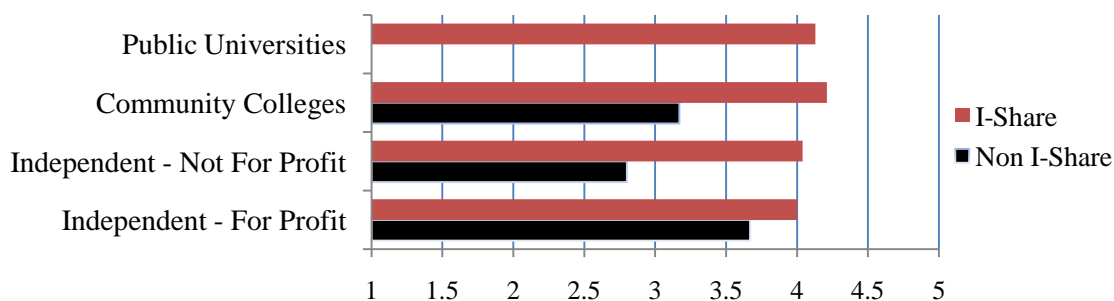


Figure 31. Have Obstacles to I-Share Participation Influenced Your Decision to Join I-Share?

First Open-ended Question

The following is a summary of respondent answers to the statement, “If you share an ILS with another consortium or library system, briefly explain why you chose this consortium or library system over I-Share.” A total 16 comments were received from all respondents, with 1 (6.3%) coming from I-Share members and 15 (93.7%) from non I-Share members.

I-Share Member Responses

The single I-Share response was received from a community college library director. The respondent indicated that they left their former multi-type library system for I-Share because they felt that their former multi-type library system was not moving forward, and it did not offer training services.

Non I-Share Member Responses

Among non I-Share respondents, 10 (66.7%) were received from library directors at community colleges, 3 (20.0%) from independent – not for profit institutions, and 2 (13.3%) from independent – for profit institutions.

Of the comments given by community college respondents, there were several reasons given why these directors preferred to keep their libraries aligned with a local, multi-type library system. Four directors indicated that the composition of their local student population – specifically high school students enrolled in college-level classes and developmental students - was an important factor in remaining with a multi-type library system that included public and school libraries. Another reason given by two directors was the consequence that moving to I-Share would be letting down the members of their current multi-type library system.

Other reasons offered by community college directors on why they chose not to join I-Share included: 1) CARLI would not be as reactive to their needs in comparison to their current multi-type library system, 2) the preference of the close proximity of their local multi-type library system, and 3) limitations of the Voyager ILS platform.

Among the three comments received from independent – not for profit institutions, all three directors indicated that they preferred their own in-house ILS than the I-Share platform. One respondent stated that moving to a shared ILS such as I-Share would require giving up local control – something they felt not worth the benefits of participating in I-Share.

For the two respondents from independent – for profit institutions, one director stated that they had used Voyager before and had no plans to use this ILS platform again. The other respondent stated that they were very small and could manage resource sharing needs better by working with their local public library rather than joining I-Share.

Second Open-ended Question

The following is a summary of respondent answers to the question, “Assuming your immediate supervisor asked you to explain your decision about I-Share membership, how would you summarize your decision?” A total of 56 comments were received from all respondents, with 34 (60.7%) offered by I-Share members and 22 (39.3%) from non I-Share members.

I-Share Member Responses

Among the 34 I-Share respondents, 6 (17.6%) were received from public universities, 9 (26.5%) were from community colleges, 17 (50.0%) from independent – not for profit institutions, and 2 (5.9%) from independent – for profit institutions.

Two themes emerged from the six responses offered by public university respondents. Four stated that resource sharing through I-Share's large, academically centered collection was critical to the mission of their library and something they have come to rely upon. One of these four directors suggested that moving to a stand-alone ILS environment was unthinkable considering the fact that collection budgets have been severely cut over the past several years. Two public university directors commented that collaboration was an important reason in their decision to join I-Share.

The nine responses received from community college members centered around four different areas. Five directors commented on the importance of being able to offer I-Share's large collection to their students. Two directors mentioned the value I-Share represents in terms of the cost to run an ILS in-house and the benefits associated with resource sharing. Technical support and training offered by CARLI staff were reasons mentioned by the remaining two community college library directors.

Much like the other comments given by I-Share members to this question, the 17 library directors from independent – not for profit institutions considered access to I-Share's collection as being a critical service for their library. Eleven of the seventeen directors stated that resource sharing through a large, academically-focused catalog was the main reason in their decision to join I-Share. Five directors added the value of I-Share in comparison to joining a local multi-type library system or managing an ILS on their own. One director suggested that the decision to join I-Share has been made easier with the reorganization of Illinois library systems as a consequence of the budget crisis currently ongoing in Illinois. For the two independent – for profit respondents, resource sharing and delivery were the main reasons they joined I-Share.

Non I-Share Member Responses

Of the 22 responses received from non I-Share members, 11 (50.0%) were given by community college library directors, 9 (40.9%) from directors with independent – not for profit institutions, and 2 (9.1%) from directors at independent – for profit institutions.

Within the 11 responses from community college directors, six stated that their current multi-type library system meets their needs better than what I-Share has to offer. Two community college directors stated that they preferred to stay with their local, multi-type library system because of familiarity with current colleagues and that their developmental students would not benefit from the I-Share collection.

Continuing with comments given by community college directors, two mentioned prohibitive costs with I-Share as being their reason not to join. One director stated that they hoped to join in the next enrollment period and one director said that they did not have enough information to make a decision to join I-Share.

Of the nine responses given by directors from independent – not for profit institutions, four stated that the costs to join I-Share were too much. Three directors indicated that they want the autonomy to run their ILS in-house rather than share a catalog with other libraries. Two independent – not for profit library directors said that the lack of demand for resource sharing at their library did not justify the move to I-Share.

Of the two directors responding from an independent – for profit institution, one said that the costs associated with migrating local records from a local system into I-Share were too expensive and not worth the move. The other director preferred the ability to manage their own ILS.

CHAPTER 5

DISCUSSION OF FINDINGS

A book is also an object, and a piece of technology; in fact, a book is an extraordinary effective piece of technology, portable, durable, expensive to pirate but easy to use, not prone to losing all its data in crashes, and capable of taking an amazing variety of beautiful forms. (Gomez, 2008, p. 23)

Introduction

This chapter endeavors to discuss the findings and comments received by CARLI directors through the survey instrument in seven parts. Part one will present respondent profile information. Parts two through five will discuss the findings of the primary research question and the three sub-questions of this study. Part six will discuss findings in light of the two theoretical frameworks; Diffusion of Innovation and Resource Dependency Theory. Part seven will discuss recommendations for future research and include a conclusion to the dissertation. A restatement of the primary research question and sub-questions used in this study are provided below:

Primary Research Question

What are the factors that influence an academic library director's decision to join, or not join, a statewide academic library consortium sharing a common integrated library system?

Sub-questions

1. What are the advantages of participating in I-Share as perceived by member and non member library directors?
2. What are the disadvantages of participating in I-Share as perceived by member and non member library directors?

3. What are the obstacles to joining I-Share as perceived by member and non member library directors?

Profile Data

Of the eight respondents that were from a public university library, all were I-Share members. Figure 32 presents the age distribution of public university library directors that responded to this survey.

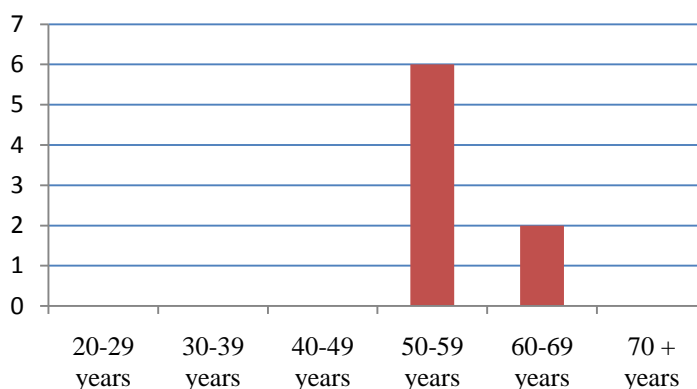


Figure 32. Age of Public University Library Director Respondents

In considering the gender of respondents from public university libraries, five directors were female (62.5%) and three were male (37.5%). Of all four institution types sampled in this survey, public university libraries had the highest percentage of male directors. Figure 33 presents the gender of public university directors that responded to this survey, and Figure 34 presents their academic training.

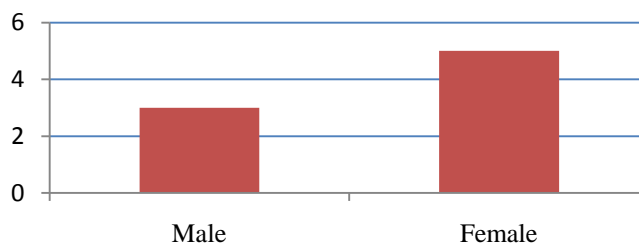


Figure 33. Gender of Public University Library Director Respondents

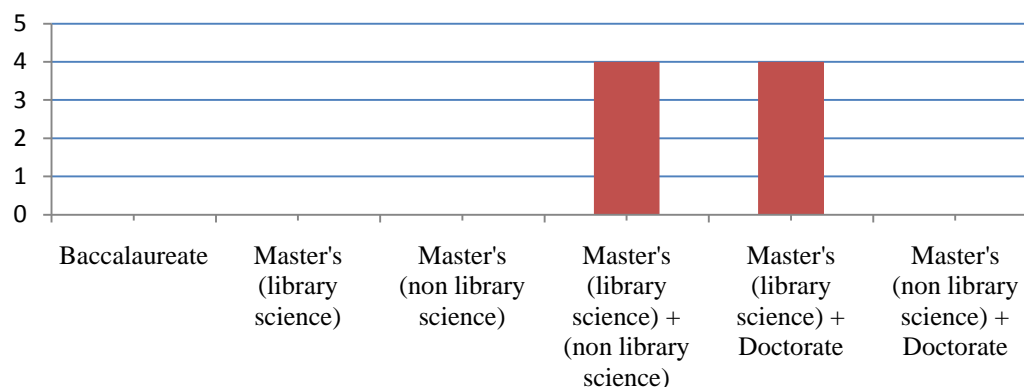


Figure 34. Academic Training of Public University Library Director Respondents

Among all four institution types sampled in this study, community colleges had the highest response rate (60.5%), with 14 being received from I-Share members and 12 from non I-Share members. This interest to share opinions about I-Share membership may be due in part to the unique position many community college library directors find themselves with libraries that do not have the same research mission as compared to academic libraries at four-year colleges and universities (Foote, 1998).

In comparing respondent profile information, the age and gender of community college library directors were nearly equally distributed between I-Share affiliation. Figure 35 shows the age distribution of community college respondents, and Figure 36 their gender distribution.

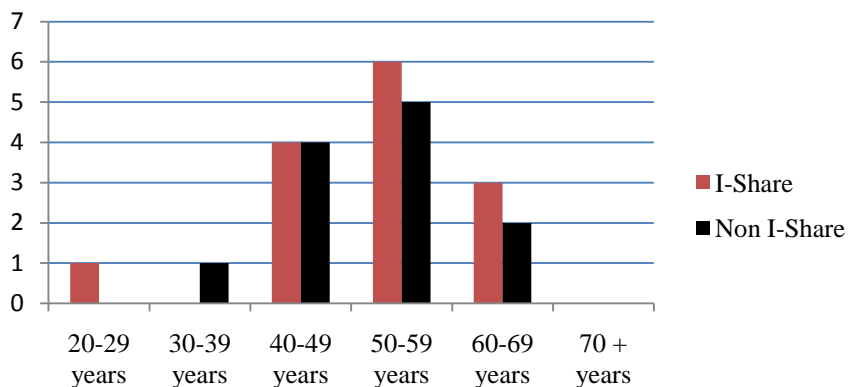


Figure 35. Age Comparison of Community College Library Director Respondents by I-Share Affiliation

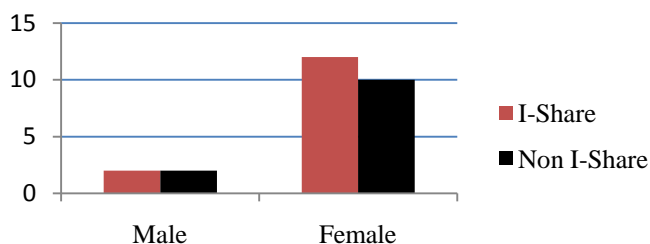


Figure 36. Gender Comparison of Community College Library Director Respondents by I-Share Affiliation

In analyzing the academic training of community college respondents, both I-Share and non I-Share member directors shared similar educational backgrounds. Although one I-Share director reported a baccalaureate degree as the highest degree attained, and one non I-Share director indicated both a Master's degree in library science and a doctorate, the remaining 24 community college library directors reported nearly identical academic training hence it does not appear that academic training is an indicator of I-Share membership. Figure 37 compares the academic training of community college director respondents by I-Share affiliation.

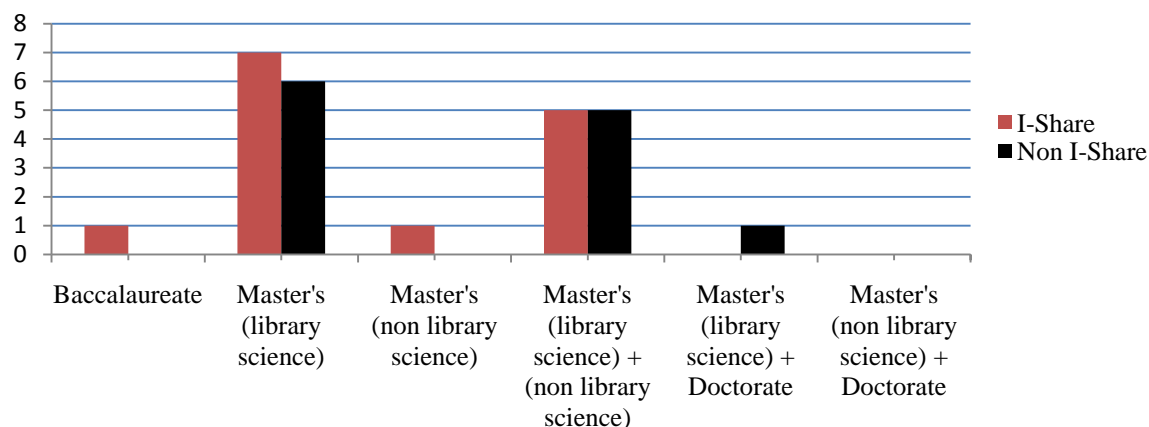


Figure 37. Comparison of Academic Training of Community College Library Director Respondents by I-Share Affiliation

The 37 responses from independent – not for profit institutions were the most received from any institution type sampled in this study, with 27 (73.0%) being received from I-Share directors and 10 (27.0%) from non I-Share directors. In comparing the age and gender of I-Share and non I-Share directors from independent – not for profit institutions that responded to the survey, both variables show a similar distribution. Figures 38 and 39 present the age and gender of library directors from independent – not for profit institutions that responded to this survey by I-Share affiliation.

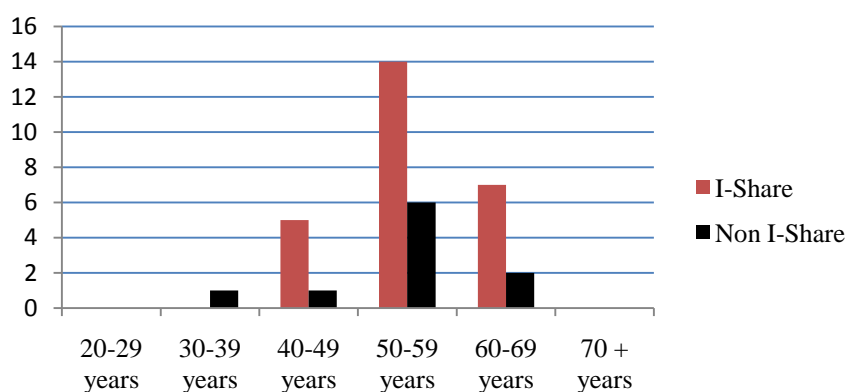


Figure 38. Age Comparison of Independent – Not for Profit Library Director Respondents by I-Share Affiliation

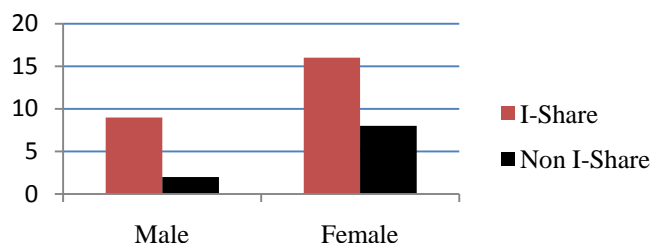


Figure 39. Gender Comparison of Independent – Not for Profit Library Director Respondents by I-Share Affiliation

In looking at the academic training of library directors from independent – not for profit institutions, all respondents indicated at least a Master's degree in library science. I-Share libraries did have a higher percentage of directors having attained two graduate degrees in comparison to non I-Share directors. Figure 40 shows the academic training of independent – not for profit library directors by I-Share affiliation.

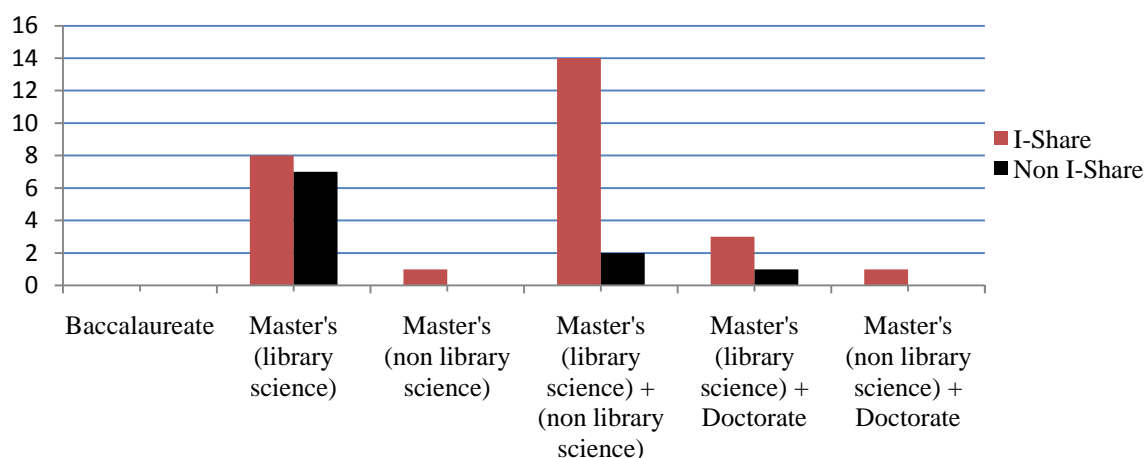


Figure 40. Comparison of Academic Training of Independent – Not for Profit Library Director Respondents by I-Share Affiliation

Of the four institution types sampled in this survey, the six library directors from independent – for profit institutions represented the smallest group of respondents. Notwithstanding this fact, the findings from this institutional type are valuable and help

shed light upon the perspectives of library directors working in independent – for profit institutions.

In comparing the age of I-Share and non I-Share directors from independent –for profit institutions, all three I-Share directors indicated an age between 60 and 69 years. The three non I-Share directors reported ages of 40 to 49, 50 to 59, and 60 to 69 years respectively. Figures 41 compares the age of library directors from independent –for profit institutions that responded to this survey by I-Share affiliation.

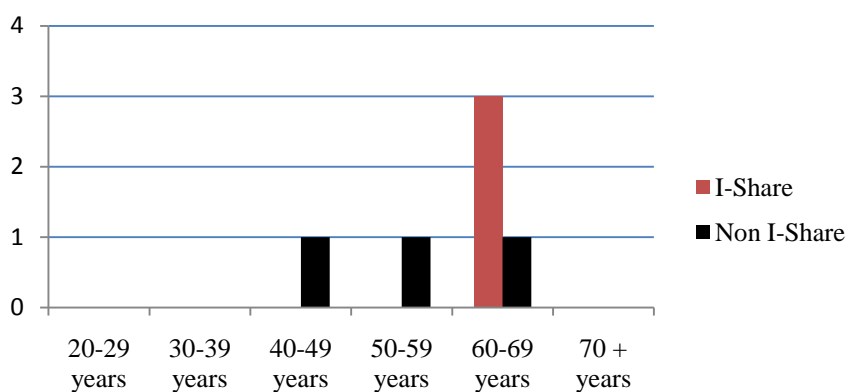


Figure 41. Age Comparison of Independent –for Profit Library Director Respondents by I-Share Affiliation

Findings regarding gender and academic training for all six library directors responding to this survey from independent – for profit institutions were identical. Figure 42 compares the gender of the six directors, and Figure 43 compares their academic training.

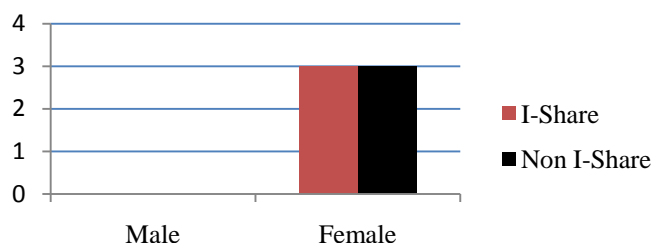


Figure 42. Gender Comparison of Independent –for Profit Library Director Respondents by I-Share Affiliation

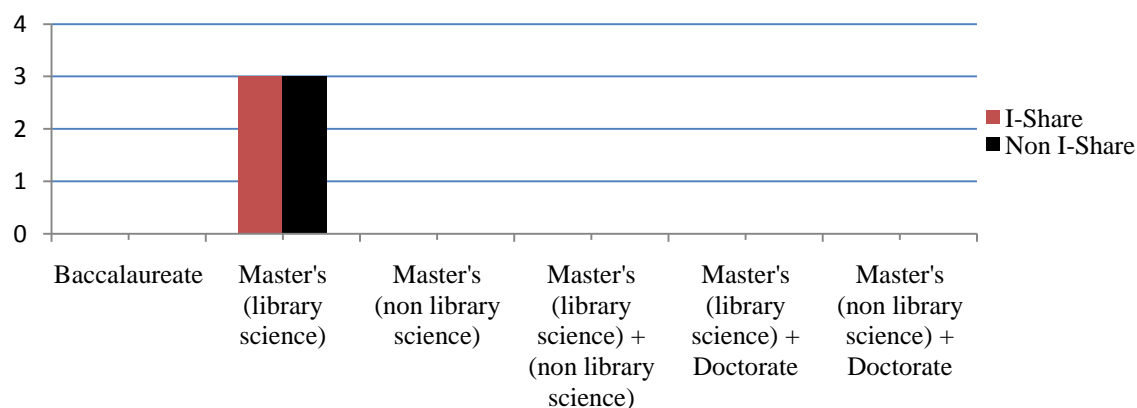


Figure 43. Comparison of Academic Training of Independent – for Profit Library Director Respondents by I-Share Affiliation

Primary Research Question

In addressing the reasons that influenced library directors from public universities to join I-Share, the findings and comments clearly indicate that resource sharing is the primary reason that these libraries are members of I-Share. The cost benefit of sharing an ILS was also a common theme emphasized by these directors. This was a somewhat surprising response and may be indicative of the economic climate facing public higher education in Illinois at this time.

In considering the influence of I-Share advantages, disadvantages, and obstacles upon a decision to join I-Share, community college library directors had markedly different views. In terms of the influence of advantages (Table 45), I-Share directors assigned a value of “Very Important” while non I-Share directors had a value of “Somewhat Important”. This difference of opinion carried through regarding the influence of disadvantages (Table 46) and obstacles (Table 47) in the decision to join.

For I-Share member community colleges, the advantages associated with resource sharing through a centrally managed ILS represented the main reasons for wanting to join I-Share. These benefits not only impact students and faculty, but also bring a pecuniary windfall of lower-long term costs – which can be realized after start-up costs associated with migrating records can be absorbed. In the open-ended question that concluded this survey, one community college director described I-Share in this way. “There is no way we could afford the high quality of service and support that we receive via I-Share. It is tremendously valuable for our students.”

It is also important to recognize that the community college directors that have opted to join I-Share consider I-Share’s collection size as a critical advantage. For these directors with generally smaller budgets than four-year college and university libraries, the capability to draw from a collection as immense as I-Share’s is an opportunity to put their community college on an equal footing with other institutions. The following comment captures the importance of I-Share’s collection. “It [I-Share] gives us more access to academic collections than any other consortium and patron-initiated borrowing is easy and widely available to our patrons.”

For non I-Share community college library directors, issues surrounding the prospect of leaving a multi-type library system, migration costs, and lack of open enrollment periods represent the major factors in a decision not to join I-Share. With respect to the issue of remaining aligned with a multi-type library system, community college directors offered several reasons for this decision in the open-ended questions that concluded the survey.

One reason offered by non I-Share community college directors to not join I-Share was that community college libraries could better serve their dual credit students – students concurrently enrolled in both high school and community college – by remaining in a local, multi-type library system. High school students that were familiar with the interface of their local public library and school catalog would also be familiar with how to search the catalog of the community college library.

Another reason expressed by several community college directors was the concern that I-Share's academically-focused collection would ultimately alienate developmental students with lower reading levels. Reading genres that are attractive and conducive for developing reading skills could still be found if the community college library remained affiliated with the local, multi-type library system. On this same theme, the importance of sustaining relationships on a personal level with members of multi-type library systems can also be attributed to a decision to not join I-Share by some community college library directors.

With respect to costs, it is obvious that many community colleges cannot afford the price to unbundle records from an existing ILS to I-Share. Notwithstanding this obstacle, it should be noted that multi-type library systems in Illinois are undergoing a

complete reorganization that will likely consolidate the 10 existing systems into three. It is still unclear if these three new systems will merge existing ILS platforms however this consolidation may serve as an impetus for some community college libraries to reconsider their standing with multi-type library systems – which may ultimately influence the decision for some directors to join I-Share. This consolidation may also put more pressure upon CARLI administrators to reconsider the frequency of I-Share enrollments as interest to join I-Share increases.

In considering the issue of lack of open enrollment periods, the findings from non I-Share community college libraries clearly indicate that this is a major obstacle to joining I-Share (Table 33). Interestingly, when these same community college library directors were asked if they planned to join I-Share in the next open enrollment period only two indicated that they planned to join (Table 11). Prohibitive migration costs are likely the reason for this small number.

As with the difference in opinion discovered of directors from community college libraries, library directors from independent – not for profit institutions also held different views regarding the influence of I-Share advantages (Table 45), disadvantages (Table 46), and obstacles (Table 47) upon a decision to join. The sharpest contrast was found in obstacles, with I-Share directors having a value of “Disagree” and non I-Share “Agree”.

By the responses given by I-Share library directors from independent – not for profit institutions, the advantages associated with resource sharing have had the greatest influence upon the decision to join I-Share. These libraries value I-Share’s large collection and capability to offer patron-initiated borrowing facilitated through the Lanter delivery system. The following comment was typical of many opinions expressed by I-

Share library directors. “I-Share enables us to offer access to collections that we could never build on our own, and at a reasonable cost.”

In terms of disadvantages and their influence upon the decision to join I-Share, library directors from I-Share independent – not for profit institutions were generally consistent in their comments that any disadvantages with I-Share membership are small in comparison to the advantages and have had no influence upon the decision to join I-Share.

For non I-Share library directors from independent – not for profit institutions, benefits associated with I-Share membership were given an overall value of “Somewhat Important” (Table 45). Though not as high as the “Important” rating given by their I-Share member colleagues, it is fair to surmise that these directors do appreciate the value of I-Share advantages.

With respect to the disadvantages of I-Share as viewed by non I-Share directors from independent – not for profit institutions, the need to share an ILS has played a significant role in the decision not to join I-Share. Though there may be several reasons for this aversion to wanting to share an ILS, one important reason may be the need to cede some degree of local autonomy (Breeding 2004). The following comment was given by a non I-Share director. “We still have other ways of accomplishing the ‘good’ parts of I-Share so the disadvantages of I-Share - which detract from our sense of the best ways to serve our campus users – far outweigh the advantages.”

The overarching obstacle as indicated by both I-Share and non I-Share directors from independent – not for profit institutions is the infrequency of open enrollment periods. And much like the tepid response of community college directors when asked if

planning to join I-Share in the next open enrollment period, only three of 10 non I-Share directors from independent - not for profit institutions indicated that they planned to join (Table 11). This is likely attributed to the prohibitive migration costs associated transferring records from a current ILS, an obstacle confronting all non I-Share institution types as discovered through this survey.

In considering the collective influence of I-Share's advantages, disadvantages, and obstacles upon a decision to join I-Share, answers provided by directors from independent – for profit institutions were slightly less contrasting than those given by directors from community colleges and independent – not for profit institutions .

When asked to rate the importance of I-Share disadvantages (Table 46) upon the decision to join I-Share, both I-Share and non I-Share directors had “No Opinion” with identical mean values (3.67). In terms of the influence of obstacles (Table 47), I-Share members assigned a value of “Disagree” while non I-Share members had “No Opinion”. Regarding the influence of advantages (Table 45), I-Share members considered these “Important” and non I-Share “Somewhat Important”.

The most likely factors influencing the decision to join I-Share by I-Share members were centered on resource sharing and the ability to access the I-Share catalog. With many of the libraries from independent – for profit institutions having small collections, the ability to share with other academic libraries can be invaluable. One director stated, “Participating in I-Share has increased resources available to our faculty and staff in disciplines not collected by our library.”

For library directors from independent –for profit institutions who have not joined I-Share, the findings suggest that the costs to migrate local records into I-Share's

Voyager ILS as an influential factor in the decision not to join. Another significant factor is the infrequency of open enrollment periods into I-Share. When asked if they plan to join I-Share in the next open enrollment period, the three non I-Share directors indicated that they did not plan to join.

First Sub-question - Advantages of I-Share Participation

For public university library directors, benefits related to resource sharing were considered paramount. All eight directors answered “Very Important” to questions regarding the I-Share advantages of access to a large-academically focused collection (Table 16), and participation in the Lanter delivery system (Table 25). One public university library director commented, “Being a member of such a large group of libraries is truly essential to provide quality library service to our students and faculty.” This sentiment regarding the critical nature of access and delivery is consistent with the research mission of university libraries.

It was interesting to note that the I-Share advantage receiving the lowest mean (3.63) by public university library directors was the ability to freely import bibliographic records from other I-Share libraries (Table 22). The relative apathy for this benefit is likely attributed to the fact that university libraries have more technical services personnel available to create new bibliographic records without needing to “copy catalog” records from other I-Share libraries.

Among I-Share directors from community colleges, only two advantages received a value below “Important”. The benefit to coordinate collection development with other I-Share libraries (Table 19), and the benefit to participate in I-Share committees and task

forces (Table 24) were both rated as “Somewhat Important”. These lower values were consistent among other I-Share library types for the same two questions.

The most highly rated benefit as perceived by I-Share community college library directors was the I-Share benefit of the integrated library system being managed by CARLI staff (Table 20). This would indicate that these community colleges value the cost savings and technical experience needed to manage an ILS. Other benefits highly rated by I-Share community college directors included access to a large, academically-focused collection (Table 16) and participation in the Lanter delivery system (Table 25).

The most salient difference in opinion between community college library directors and directors from other I-Share library types was the benefit to freely import bibliographic records from other I-Share libraries (Table 22). Because creating new bibliographic records is a skill generally undertaken by professional cataloging librarians, community college libraries with limited cataloging staff stand to benefit from the ability to import records created by cataloging librarians at other libraries.

Looking at non I-Share community college library directors, all values regarding I-Share benefits received either a “Somewhat Important” or “Slightly Important” rating. These perceptions of I-Share advantages were less enthusiastic in comparison to directors from I-Share community colleges.

Among the 10 benefits in question, non I-Share community college directors considered access to a large, academically-focused collection as the most important. However the mean value assigned to this benefit was nearly a full point below community college I-Share members, and was the second lowest among all library types

for the question (Table 16). This finding illustrates the disparity of opinion that is unique among community college library directors in comparison to other institution types.

For I-Share library directors in independent – not for profit institutions, access to a large, academically-focused collection (Table 16), patron-initiated borrowing (Table 17), and the Lanter delivery system (Table 25) were benefits rated as having the highest importance. All three of the services are related to resource sharing which is consistent with comments made by these same directors. One director offered the following, “I believe the most important benefit my institution receives from our participation in I-Share is the opportunity to share resources with other academic libraries.”

For non I-Share library directors from independent – not for profit institutions, the benefit of a large, academically-focused collection was considered the most important benefit of all. In fact these directors rated this benefit higher than other non I-Share institution types with 6 of the 10 directors rating access to a large, academically-focused collection as “Very Important” (Table 16). This was an interesting response, considering that non I-Share libraries cannot offer patron-initiated borrowing to their students.

One possible explanation for the high value place by non I-Share directors from independent - not for profit libraries could be the ability of these non I-Share libraries to borrow from I-Share libraries on an institutional level. Hence these directors have ostensibly elected to run their own ILS in-house while using I-Share for mediated borrowing. The following comment supports this theory, “We value the ILL participation far more than sharing the operational OPAC support.”

For I-Share members from independent –for profit institutions, three advantages had a rating of “Important” or better. The advantage receiving the highest rating was

participation in the Lanter delivery system (Table 25). The benefit of access to a large, academically-focused collection was rated as the second most important (Table 16), followed by the benefit to freely import bibliographic records from other I-Share libraries (Table 22). These ratings were consistent with the comment given by an I-Share member director regarding the advantages of I-Share. “The continued delivery system is essential to our school along with reciprocal borrowing.”

Non I-Share directors from independent – for profit institutions rated the advantage of access to an academically-focused collection highest with a value of “Somewhat Important”, though not as high as the “Important” value assigned by their I-Share colleagues (Table 16).

When comparing the collective responses of all I-Share and non I-Share libraries, I-Share institutions viewed I-Share benefits higher than their non I-Share institutional counterparts, with I-Share community colleges assigning the highest level of importance to these benefits. To discern the significance of the different responses, an independent samples t-test was applied for each institution type using a 95% confidence interval. The difference in answers given by directors from community colleges ($P < 0.0001$) and independent – not for profit institutions ($P < 0.0001$) was found to be statistically significant (Table 42).

Though I-Share libraries from independent - for profit institutions viewed I-Share benefits more favorably than their non I-Share counterparts, the difference in answers between I-Share and non I-Share members of this institutional group was not statistically significant ($P = 0.1514$).

Second Sub-question - Disadvantages of I-Share Participation

In discussing the seven questions regarding the disadvantages of I-Share participation, all public university library respondents assigned a rating of “Disagree”. The consensus of opinion among public university library directors can be encapsulated by the following comment, “There are no disadvantages of I-Share participation when all members agree to share.”

Among these same seven questions regarding the disadvantages of I-Share participation, I-Share directors from community colleges considered the need to change library workflows as being the most credible (Table 31). This is likely attributed to the fact that for many libraries joining I-Share, a reorganization of circulation and interlibrary loan workflows is needed. I-Share directors from other library types had similar opinions regarding the need to change library workflows. The remaining six questions regarding the disadvantages of I-Share received a value of “Disagree” from I-Share community colleges.

For non I-Share community college library directors, the biggest drawback to participating in I-Share is less contact with other consortia and library systems (Table 32). The most likely reason for this response is the legacy of partnership between community college libraries and multi-type library systems. Although multi-type library system collections are not as academically-focused as I-Share’s collection, many community college directors would still prefer to remain aligned with these systems than risk losing long-standing relationships with local colleagues from public libraries. It is an interesting perspective and one that is fairly unique to community college libraries. In addressing the open-ended question in this section, one community college director

characterized I-Share and their multi-type library system as, “comparable to a big city and a small town.”

In considering disadvantages of I-Share membership, I-Share and non I-Share library directors from independent – not for profit institutions both rated the need to comply with I-Share standards for managing patron data as being the most credible of all disadvantages (Table 29). This consensus may be a reaction to CARLI policies regarding how I-Share libraries must handle patron information in the ILS. For example, to protect a student’s privacy CARLI has established a policy that precludes the inclusion of a Social Security number with a patron record. Though this policy does serve to protect personal information from becoming compromised, it can make the process of identifying students much more difficult for individual libraries. It has also forced I-Share libraries from institutions that use Social Security numbers to create a new numbering system for identifying students.

In terms of disadvantages as perceived by non I-Share libraries from independent – not for profit institutions, the prospect of sharing an ILS was not viewed favorably by some directors (Table 26). As one respondent succinctly said, “A shared ILS is not desirable at our library.”

I-Share members from independent – for profit institutions gave a value of “Disagree” to five of the seven disadvantages questioned in the survey. The disadvantage of less contact with other consortia and library systems (Table 32) and the disadvantage of sharing an integrated library system with other libraries (Table 26) both received a “No Opinion”. In fact, I-Share directors from independent – for profit institutions had the

lowest mean value (3.33) of all library types regarding the need to share an integrated library system.

One possible reason that I-Share library directors from independent – for profit libraries ranked the need to share an integrated library system lower than other I-Share library types may be attributed to the fact that libraries from these institutions tend to be very small (Breneman, 2006). Because the functionality of an ILS is designed to handle the needs of libraries with large collections and patron databases, the experience of these directors may be that I-Share’s Voyager platform is too robust for their smaller libraries.

For non I-Share directors, the need to change library workflows was deemed to be the most serious disadvantage (Table 31). This was followed by the disadvantage that that I-Share membership would result in less contact with other consortia and library systems (Table 32). Both of these disadvantages received a value of “Agree”.

Another concern mentioned in the open-ended question regarding the disadvantages of I-Share membership was the Voyager ILS platform. One non I-Share member commented, “I have used Voyager before and found it in constant need of patches and upgrades.”

Looking at the collective responses regarding the disadvantages of I-Share, all I-Share institutions viewed these disadvantages with less agreement than their non I-Share counterparts. As was the case with the collective responses given for the benefits of I-Share participation, the answers given by I-Share community colleges were the most favorable for I-Share participation. Non I-Share respondents from independent – for profit institutions collectively viewed these disadvantages with the most agreement (Table 43).

To compare the difference in answers regarding the disadvantages of I-Share, an independent samples t-test using a 95% confidence interval was applied to each institution type. The difference in answers given by directors from community colleges ($P < 0.0001$), independent - not for profit ($P = 0.0004$), and independent - for profit ($P = 0.0010$) institutions was found to be statistically significant.

Third Sub-question - Obstacles to I-Share Participation

In terms of obstacles to I-Share participation, there was a recognition by public university respondents that the infrequency of open enrollment periods represents a legitimate hurdle for many libraries. Both questions regarding the infrequency (Table 33), and lack of communication (Table 34), regarding I-Share open enrollment periods were rated the most significant obstacles by public university library directors.

In considering the nine questions regarding the obstacles to I-Share participation, both I-Share and non I-Share community college library directors shared the belief that the infrequency of open enrollment periods is a major obstacle to I-Share participation by assigning a value of “Agree” (Table 33). Another major obstacle indicated by non I-Share community college library directors was the cost to migrate local records from a current integrated library system into I-Share (Table 36). The entire process to migrate records can be taxing both in terms of costs and coordination.

To migrate records often requires first paying an exit fee to unbundle bibliographic records from an existing ILS - usually a multi-type library system. If unbundling records from an in-house ILS, technical expertise is needed to capture thousands of bibliographic, item, and patron records in a format that can be exported to an ILS such as I-Share’s Voyager platform. Often these local records will need

additional configuring to conform to new standards and conventions for MARC records in the new ILS. One community college library director stated in the open-ended question that concluded this section, “Migrating from our current ILS is a show-stopper for us for even considering I-Share.”

The discontent over the infrequency of open enrollment periods was shared by both I-Share and non I-Share directors from independent not-for-profit institutions (Table 33). In fact, this obstacle was considered the most serious by both I-Share and non I-Share directors. The frustration surrounding this issue can best be understood in the thoughts inveighed by one I-Share director. “We are a long-term member, but I am getting really tired of the colleague schools that I would find beneficial to join to be repeatedly told that I-Share cannot accept them.” Non I-Share directors were equally vexed by the lack of open enrollment. “Our decision to join I-Share has been made long ago, but we have not been allowed to join.” The issue of prohibitive costs associated with migrating local records from a current library system was also considered a significant obstacle to I-Share participation by non I-Share library directors from independent – not for profit institutions (Table 36).

Both I-Share and non I-Share library directors from independent – for profit institutions considered the cost to migrate local records from a current integrated library system into I-Share’s Voyager ILS as being the most significant obstacle to joining I-Share, with I-Share members giving a value of “Agree” and non I-Share members “Strongly Agree” (Table 36).

When analyzing the collective responses to the obstacles associated with joining I-Share, all I-Share member institution types viewed these obstacles with less agreement

than their non I-Share counterparts (Table 44). In comparing the difference in these answers, an independent samples t-test using a 95% confidence interval was applied. The difference in the answers of all three institution types, community colleges ($P < 0.0001$), independent - not for profit ($P = 0.0045$), and independent - for profit ($P = 0.0012$) was found to be statistically significant.

Theoretical Framework

As mentioned in Chapter 1, two theoretical models were used as a framework for this study: 1) Rogers' (1995) Diffusion of Innovation Theory, and 2) Pfeffer and Salancik's (1978) Resource Dependency Theory. Together, both served to provide a framework to better understand how technology represented by a shared ILS was viewed by academic library directors within a statewide library consortium.

Rogers (1995) describes an innovation as an idea, practice or object that is perceived as being new to any group or social system. Diffusion of innovation is a social process in which information about a new idea or technology is viewed subjectively and thus ultimately adopted or rejected through perceivable channels, times, and modes. Adopters of innovation are grouped into five classes: innovators, early adopters, early majority, late majority, and laggards (Rogers, 1995).

The rate at which a new innovation is adopted normally follows an S-shaped curve. At the beginning, a new innovation is adopted by only a few, but then gains accelerated acceptance until roughly half of the respondents have adopted the innovation. The rate of adoption then slows as there are few remaining respondents left to adopt the innovation (Rogers, 1995). Figure 44 shows Rogers' S-shaped Diffusion Process Model.

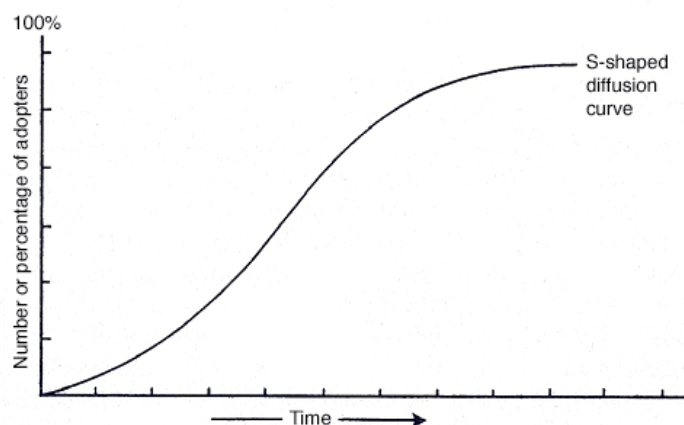


Figure 44. Rogers' S-Shaped Diffusion Process Model

To test Rogers' Diffusion Process Model for this study, respondent answers to two library profile questions were applied: "Please indicate how long your library has been an I-Share participant" (Table 10), and "If not an I-Share participant, does your library plan to join in the next enrollment period?" (Table 11).

As can be seen in Figure 45, the rate of adoption for the 77 respondents in this survey has a much flatter "S" than Rogers' model. This can be attributed to the large percentage of "innovators" (Over 20 years) that initially joined I-Share and the low percentage of "early adopters" (16 -20 years) and "early majority" (11-15 years) members that subsequently joined. The modest spike in the middle of the S was a result of 16 "late majority" (6 – 10 years) members. The five non I-Share members that expressed an interest to join in the next open enrollment represent the "laggards".

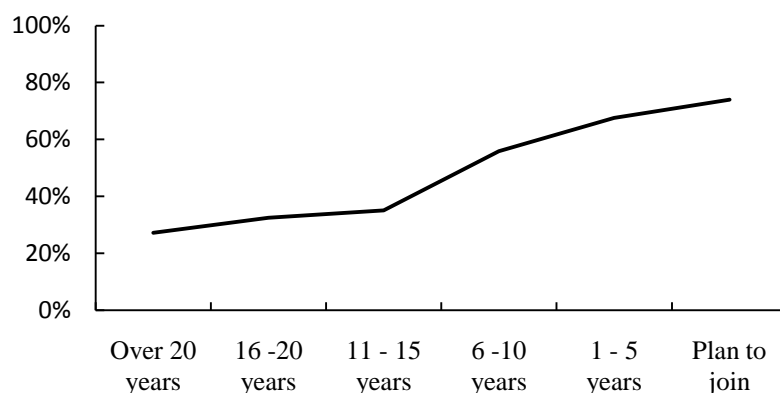


Figure 45. Rate of I-Share Membership Adoption

Rogers (1995) also suggests that, “Earlier adopters have larger units (farms, schools, companies, and so on) than later adopters” (p. 269). To determine if this characteristic was evident in I-Share libraries that responded to the survey, respondent answers to two questions were used: “Please indicate the Carnegie Classification that best represents the size of your institution” (Table 9), and “Please indicate how long your library has been an I-Share participant” (Table 10). I-Share participants defined as “innovators” (Over 20 years) and “early adopters” (16 -20 years) collectively served to comprise the “earlier adopter” category for this comparison.

When combining institutions with L4 and L2, and M4 and M2 Carnegie Classifications, large institutions comprised the highest percentage 10 (41.7%) of “earlier adopters”, followed by medium-sized institutions 8 (33.3%), and small institutions 6 (25.0%). This finding would support Rogers’ theory that early enrollees of I-Share would likely be libraries from larger institutions. Table 48 shows the number of I-Share “earlier adopters” by Carnegie Classification.

Table 48

I-Share “Earlier Adopters” by Carnegie Classification

Carnegie Classification	Earlier Adopters	Percent
Large four-year (L4) & Large two-year (L2)	10	41.7
Medium four-year (M4) & Medium two-year (M2)	8	33.3
Small four-year (S4)	6	25.0

Resource Dependency Theory (Pfeffer & Salancik, 1978) posits that organizations are dependent upon their external environment for survival. This dependency brings uncertainty and a degree of autonomy loss to the organization. To minimize the effects of environmental dependence, organizations will seek interorganizational relationships through coalitions with similar interests and needs. “It is the necessary responsibility of management to ensure the survival of the coalition, and this entails working to minimize the possibility of resources becoming scarce or uncertain” (Pfeffer & Salancik, 1978, pg. 47).

As applied in this study, the aspect of interdependence was measured in directors’ views of sharing collections through the I-Share catalog. Material from these collections represented the “resources” as described in Resource Dependency Theory. The importance assigned by all responding directors to three closed-ended questions directly related to the sharing of resources was used: 1) the benefit of access to a large, academically-focused collection (Table 16), 2) the benefit of patron-initiated borrowing

through the I-Share catalog (Table 17), and 3) the benefit to participate in the Lanter delivery system (Table 25).

Table 49 lists the mean value of all answers given regarding the benefits of I-Share participation. Of these 10 questions, the three questions used to test Research Dependency Theory in this study received the highest means. This finding would indicate support for Research Dependency Theory as applied to the importance of the sharing and predictable delivery of external resources as represented by the collections of I-Share libraries.

Table 49

Advantages of I-Share Participation Ranked by Importance for all Respondents

	N	Mean
The benefit of access to a large, academically-focused collection	77	4.55
The benefit of patron-initiated borrowing through the I-Share catalog	76	4.29
The benefit to participate in the Lanter delivery system	76	4.29
The benefit of the integrated library system being managed by CARLI staff	76	4.22
The benefit of technical support and training for ILS modules	75	4.00
The benefit to collaborate with other I-Share libraries	75	4.00
The benefit of onsite reciprocal borrowing at other I-Share libraries.	75	3.87
The benefit to freely import bibliographic records from other I-Share libraries	76	3.74
The benefit to coordinate collection development with other I-Share libraries	77	3.23
The benefit to participate in I-Share committees and task forces	76	3.18

Conclusions and Recommendations for Future Research

The challenge to contribute meaningful research describing how academic libraries view consortial membership was the impetus for this study. Now that some light has been shed upon this issue, it is the hope of this researcher that the findings of this study may have applications for both library practitioners and policy makers.

For academic library directors that have chosen to share an integrated library system with a local multi-type library system, or manage their own integrated library system in-house, there are compelling reasons to reconsider the opportunities of I-Share's larger, more academically-focused collection. These reasons are both societal and economic.

In terms of societal contributions, academic libraries serve to educate a populace for a democratic society (Hisle, 2005). In light of this charge, when given the opportunity to expand access by sharing collections with other college and university libraries, academic library directors should take a broader user perspective that includes their surrounding communities and region. This is supported by a recent report on the value of academic libraries issued by the Association of College and Research Libraries that found, "community residents who have access to academic library services and resources benefit personally and professionally" (Oakleaf, 2010, pg. 56).

There is also the potential for fostering regional economic development when presented the opportunity to share a larger, more academically-focused collection. Partnerships such as those created between the University of Toledo Libraries and economic development organizations in Northwestern Ohio allow regional private sector businesses to access the same collections used to support business education programs at

the University of Toledo as a means for supporting regional economic development (Martin, 2010). Set within the context of the decision to join I-Share, academic library directors have an opportunity to apply this model by providing regional businesses access to thousands of business-related materials otherwise not available through a multi-type library system.

For community college library directors, I-Share participation represents an opportunity to build upon the success of existing community college partnerships with other colleges and universities in supporting regional economic goals (Amey, Eddy, & Campbell, 2010). This requires viewing the library as a resource not only for local students and faculty, but for the greater region. By providing access to I-Share's immense collection, community college libraries – specifically those in rural areas – can assist in building human capital which has been identified as a strategic imperative for promoting economic vitality (Fluharty & Scaggs, 2007).

With respect to policy makers, there are serious issues that need to be addressed in making I-Share participation a possibility for all CARLI libraries. As discovered through this study, the infrequency of open enrollment periods was viewed as a significant barrier to I-Share participation. As such, serious consideration should be taken by CARLI to make available to member libraries a long-range plan that would increase the frequency of open enrollment periods in future years. This long-range plan would also serve to enable libraries to make budget preparations for migration costs – which were also identified as being a significant obstacle to I-Share participation.

Continuing with migration costs, there does exist an opportunity to leverage the economies of scale represented with I-Share participation by seeking state subsidies to

offset these expenses. By eliminating redundancies in costs associated with purchasing and managing multiple integrated library systems, as well as multiple delivery systems, state policy makers should consider incentivizing I-Share participation by helping subsidize migration costs as a means of seeking long-term savings in higher education outlays.

Lastly, a greater effort is needed to address the concerns of libraries that are not comfortable with the Voyager platform to increase interest in I-Share participation. Part of this effort could be undertaken by reaching out to non I-Share libraries to discuss these issues more thoroughly and to offer more training. Another aspect of this outreach would be to seek the input of non I-Share libraries in the decision making process when considering a new integrated library system as currently underway with plans to move to an open source platform.

Perhaps more important than the previous recommendations to library practitioners and policy makers is the hope that this research may help to spur further investigation into those findings that have raised new questions. With respect to library practitioners, the following questions are still worth examining:

- How can academic librarians better assess the impact of consortial relationships upon student success?
- In considering the extraordinary costs associated with joining a library consortium, through what time frame should a library director base a return on investment?

- What is the impact of preserving local library autonomy in lieu of participating in a consortium upon library users? Does this decision have different consequences for academic libraries as opposed to public and school libraries?
- How do library practitioners ensure that outside accrediting agencies understand that the new archetype for library service is about access rather than ownership?
- How successful have academic library practitioners been in justifying the need for future library services to administrators, faculty, and staff amid free web-based search engines such as Google and Yahoo? Have librarians been too reticent in communicating to those outside of the library?

For policy makers, the following questions may apply:

- Can academic and multi-type library consortia evolve to successfully serve the needs of all library types within one consortium?
- Is an MLS degree still requisite for a profession shifting from a legacy built around the management of physical items? Have MLS curricula become antiquated and ultimately obsolete?
- Does the diffusion of technology as widely regarded by Rogers' model apply to all higher education settings? Do academic libraries incorporate technology differently?
- How can costs associated with unbundling and migrating MARC records be reduced to allow libraries more flexibility in selecting an ILS?
- Do policy makers in higher education fully consider and understand the impact of distance education upon the academic library such as higher costs for securing rights to provide remote access to digital collections?

- Should state education agencies promote library consortia through subsidies as a means for making tax dollars more efficient?

The purpose of this study was to describe the perceived advantages, disadvantages, and obstacles that influence an academic library director's decision to join a large academic library consortium sharing an integrated library system. From this survey of 145 CARLI academic library directors, several salient themes emerged.

First, we have learned that personal profile information, such as a director's age, gender, race, and academic training, is not predictive for determining I-Share membership. This also applies to characteristics associated with the profile of the library. I-Share libraries span all institution types, sizes, and geographic settings.

Another theme discovered is that I-Share and non I-Share library directors perceive I-Share participation differently. There does exist a real difference in how the advantages, disadvantages, and obstacles associated with I-Share membership are viewed. These differences have also influenced the decision to join I-Share. We have also learned that there are non I-Share library directors that would like to become I-Share members but are unable to join because of obstacles associated with prohibitive migration costs and the infrequency of enrollment periods.

The overarching theme taken from this study is that when confronted with the decision to join a large academic library consortium sharing a common integrated library system, library directors have justifiable reasons for deciding to join, or not join. Ultimately the decision is based upon the local mission, environment, and resources of each academic library and individual institution.

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Appendix A: Large Consortia in the United States Sharing an ILS

Consortium	Type	Libraries
ALI (Academic Libraries of Indiana)	Academic	72
Amigos Library Services	Multi-type	750
California Digital Library (CDL)	Academic	9
California State University	Academic	23
CARLI	Academic	153
College Center for Library Automation	Academic	28
Colorado Alliance of Research Libraries	Multi-type	11
Florida Center for Library Automation	Academic	50
GALILEO	Multi-type	500
LOUIS: The Louisiana Library Network	Academic	40
Maine InfoNet	Multi-type	80
Maryland Digital Library	Academic	49
Michigan Library Consortium	Multi-type	600
MINITEX Library Information Network	Multi-type	1967
MOBIUS Consortium (Missouri)	Academic	60
NC LIVE	Multi-type	198
NELINET	Multi-type	661
NELLCO	Law	25
OhioLINK	Academic	88
OHIONET	Multi-type	300
Orbis Cascade Alliance	Academic	33
PASCAL	Academic	3
PALCI	Academic	55
Tenn-Share	Multi-type	553
TRLN	Academic	10
Washington Research Library Consortium (WRLC)	Academic	8
Washington State Cooperative Library Project	Academic	6
WiLS (Wisconsin Library Services)	Multi-type	550

Note. From (ICOLC, 2009b)

Appendix B: CARLI Libraries Sampled

Parent Institution of Library	IBHE Institution Type	Carnegie Classification
Adler School of Professional Psychology	INFP	VS2
American Academy of Art	IFP	VS4
Argosy University/Chicago	IFP	VS4
Augustana College	INFP	S4
Aurora University	INFP	S4
Benedictine University	INFP	S4
Black Hawk College	CC	M2
Blackburn College	INFP	VS4
Blessing-Rieman College of Nursing	INFP	VS4
Bradley University	INFP	M4
Carl Sandburg College	CC	M2
Catholic Theological Union	INFP	VS2
Chicago School of Professional Psychology	INFP	M2
Chicago State University	PU	M4
Chicago Theological Seminary	INFP	VS2
Christian Life College	INFP	VS4
College of DuPage	CC	VL2
College of Lake County	CC	L2
Columbia College	INFP	M4
Concordia University Chicago	INFP	S4
Danville Area Community College	CC	S2
DePaul University	INFP	L4
DeVry University	IFP	M4
Dominican University	INFP	S4
Eastern Illinois University	PU	L4
East-West University	INFP	S4
Elgin Community College	CC	L2
Ellis University	INFP	S4
Elmhurst College	INFP	S4
Erikson Institute	INFP	VS2
Eureka College	INFP	VS4
Fox College	IFP	VS2
Governors State University	PU	S4

Parent Institution of Library	IBHE Institution Type	Carnegie Classification
Greenville College	INFP	S4
Harold Washington College	CC	L2
Harrington College of Design	IFP	S4
Harry S Truman College	CC	L2
Heartland Community College	CC	M2
Highland Community College	CC	S2
Illinois Central College	CC	L2
Illinois College	INFP	S4
Illinois College of Optometry	INFP	S2
Illinois Eastern Community Colleges	CC	S2
Illinois Institute of Art - Chicago	IFP	S4
Illinois Institute of Technology	INFP	M4
Illinois State University	PU	L4
Illinois Valley Community College	CC	M2
Illinois Wesleyan University	INFP	S4
Institute for Clinical Social Work	IFP	VS2
International Academy of Design and Technology	IFP	S4
JKM Library Trust	INFP	S4
John A. Logan College	CC	M2
John Marshall Law School	INFP	S2
John Wood Community College	CC	S2
Joliet Junior College	CC	L2
Judson University	INFP	VS4
Kankakee Community College	CC	M2
Kaskaskia College	CC	M2
Kendall College	IFP	VS4
Kennedy-King College	CC	M2
Kishwaukee College	CC	M2
Knowledge Systems Institute	INFP	VS2
Knox College	INFP	S4
Lake Forest College	INFP	S4
Lake Land College	CC	M2
Lakeview College of Nursing	INFP	VS4
Lewis University	INFP	M4
Lexington College	INFP	VS2
Lincoln Christian College and Seminary	INFP	S4
Lincoln College	INFP	VS4
Lincoln Land Community College	CC	M2

Parent Institution of Library	IBHE Institution Type	Carnegie Classification
Loyola University Chicago	INFP	L4
MacMurray College	INFP	VS4
Malcolm X College	CC	M2
McHenry County College	CC	M2
McKendree University	INFP	S4
Meadville-Lombard Theological Seminary	INFP	VS2
Midstate College	IFP	VS4
Midwestern University	INFP	M2
Millikin University	INFP	S4
Monmouth College	INFP	S4
Moody Bible Institute	INFP	M4
Moraine Valley Community College	CC	L2
Morton College	CC	M2
National University of Health Sciences	INFP	VS4
National-Louis University	INFP	M4
North Central College	INFP	S4
North Park University	INFP	S4
Northeastern Illinois University	PU	M4
Northern Illinois University	PU	L4
Northern Seminary	INFP	VS2
Northwestern College	IFP	S2
Northwestern University	INFP	L4
Oakton Community College	CC	L2
Olivet Nazarene University	INFP	M4
Parkland College	CC	L2
Prairie State College	CC	M2
Principia College	INFP	VS4
Quincy University	INFP	S4
Rend Lake College	CC	M2
Richard J. Daley College	CC	L2
Richland Community College	CC	S2
Robert Morris University	INFP	M4
Rock Valley College	CC	L2
Rockford College	INFP	S4
Roosevelt University	INFP	M4
Rosalind Franklin University of Med.& Science	INFP	S2
Rush University	INFP	S4
Saint Anthony College of Nursing	INFP	S4

Parent Institution of Library	IBHE Institution Type	Carnegie Classification
Saint Augustine College	INFP	S4
Saint Francis Medical Center College of Nursing	INFP	VS4
Saint John's College of Nursing	INFP	VS4
Saint Xavier University	INFP	M4
Sauk Valley Community College	CC	S2
School of the Art Institute of Chicago	INFP	M4
Shawnee Community College	CC	S2
Shimer College	INFP	VS4
South Suburban College	CC	M2
Southeastern Illinois College	CC	S2
Southern Illinois University Carbondale	PU	L4
Southern Illinois University Edwardsville	PU	L4
Southern Illinois University School of Medicine	PU	L4
Southern Illinois University-School of Law	PU	L4
Southwestern Illinois College	CC	L2
Spertus Institute of Jewish Studies	INFP	VS2
Spoon River College	CC	S2
Springfield College in Illinois	INFP	VS2
Taylor Business Institute	IFP	VS2
Trinity Christian College	INFP	S4
Trinity College of Nursing	INFP	S4
Trinity International University	INFP	S4
Triton College	CC	L2
United Library	INFP	VS2
University of Chicago	INFP	L4
University of Illinois at Chicago	PU	L4
University of Illinois at Springfield	PU	S4
University of Illinois at Urbana-Champaign	PU	L4
University of Saint Francis	INFP	S4
U. of St. Mary of the Lake Mundelein Seminary	INFP	VS2
VanderCook College of Music	INFP	VS4
Waubonsee Community College	CC	M2
Western Illinois University	PU	L4
Wheaton College	INFP	S4
Wilbur Wright College	CC	L2
William Rainey Harper College	CC	L2

Appendix C: Integrated Library Systems Used by CARLI Libraries

Parent Institution of Library	Integrated Library System
Adler School of Professional Psychology	I-Share
American Academy of Art	Stand Alone
Argosy University/Chicago	Stand Alone
Augustana College	I-Share
Aurora University	I-Share
Benedictine University	I-Share
Black Hawk College	Prairie Area Library System
Blackburn College	Lewis & Clark Library System
Blessing-Rieman College of Nursing	Alliance Library System
Bradley University	I-Share
Carl Sandburg College	I-Share
Catholic Theological Union	I-Share
Chicago School of Professional Psychology	I-Share
Chicago State University	I-Share
Chicago Theological Seminary	Not automated
Christian Life College	Stand Alone
College of DuPage	Stand Alone
College of Lake County	Stand Alone
Columbia College	I-Share
Concordia University Chicago	I-Share
Danville Area Community College	I-Share
DePaul University	I-Share
DeVry University	Stand Alone
Dominican University	I-Share
Eastern Illinois University	I-Share
East-West University	Stand Alone
Elgin Community College	Stand Alone
Ellis University	Not automated
Elmhurst College	I-Share
Erikson Institute	Stand Alone
Eureka College	I-Share
Fox College	n/a
Governors State University	I-Share
Greenville College	I-Share
Harold Washington College	City Colleges of Chicago

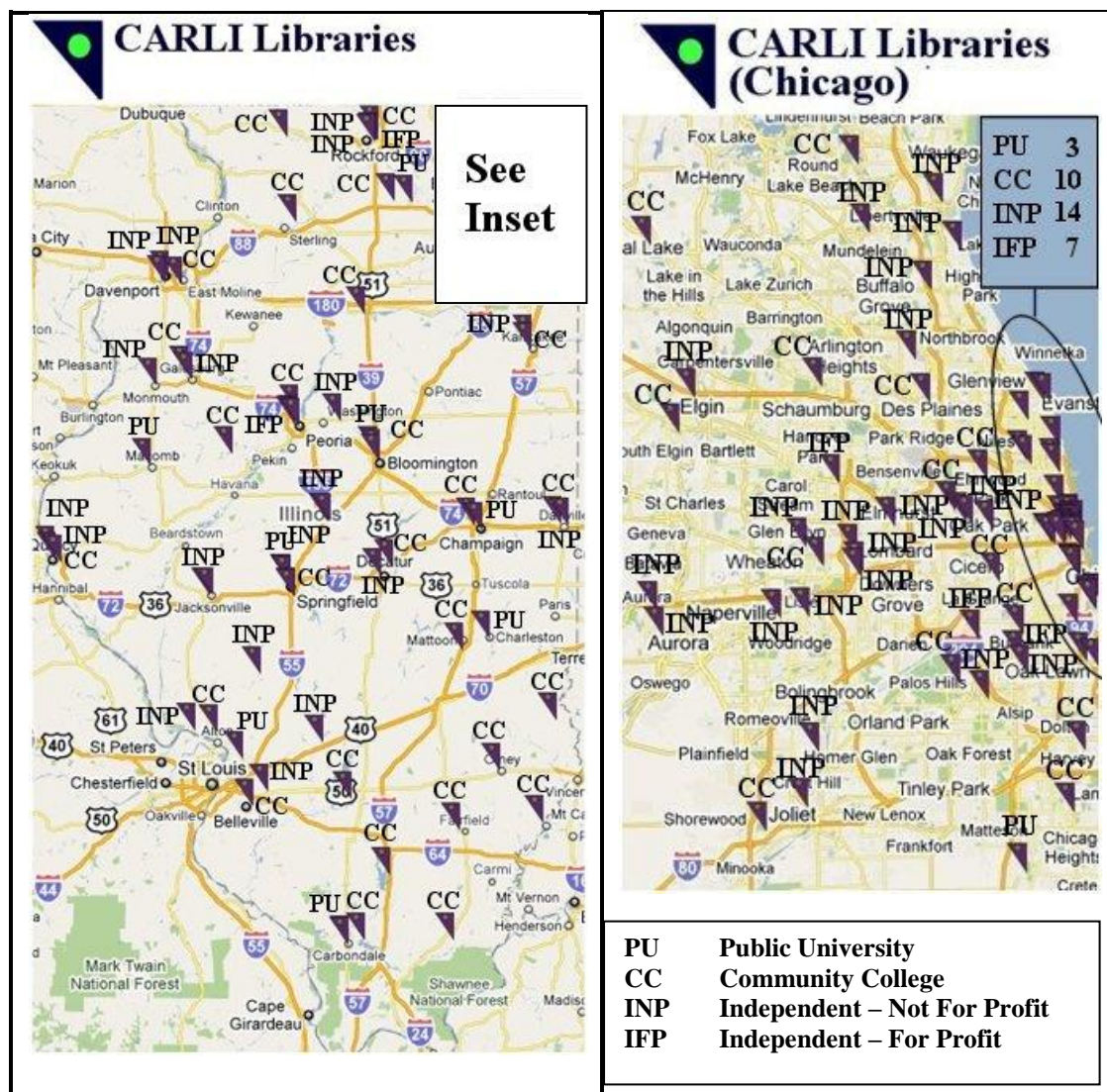
Parent Institution of Library	Integrated Library System
Harrington College of Design	I-Share
Harry S Truman College	City College of Chicago
Heartland Community College	I-Share
Highland Community College	Prairie Area Library System
Illinois Central College	I-Share
Illinois College	I-Share
Illinois College of Optometry	Stand Alone
Illinois Eastern Community Colleges	I-Share
Illinois Institute of Art - Chicago	Stand Alone
Illinois Institute of Technology	I-Share
Illinois Math and Science Academy	I-Share
Illinois State University	I-Share
Illinois Valley Community College	I-Share
Illinois Wesleyan University	I-Share
Institute for Clinical Social Work	Stand Alone
International Academy of Design and Technology	n/a
JKM Library Trust	Stand Alone
John A. Logan College	Shawnee Library System
John Marshall Law School	Stand Alone
John Wood Community College	I-Share
Joliet Junior College	I-Share
Judson University	I-Share
Kankakee Community College	I-Share
Kaskaskia College	Shawnee Library System
Kendall College	I-Share
Kennedy-King College	City Colleges of Chicago
Kishwaukee College	Stand Alone
Knowledge Systems Institute	Stand Alone
Knox College	I-Share
Lake Forest College	I-Share
Lake Land College	Lincoln Trail Library System
Lakeview College of Nursing	Lincoln Trail Library System
Lewis and Clark Community College	I-Share
Lewis University	I-Share
Lexington College	Not automated
Lincoln Christian College and Seminary	I-Share
Lincoln College	Rolling Prairie Library System
Lincoln Land Community College	I-Share

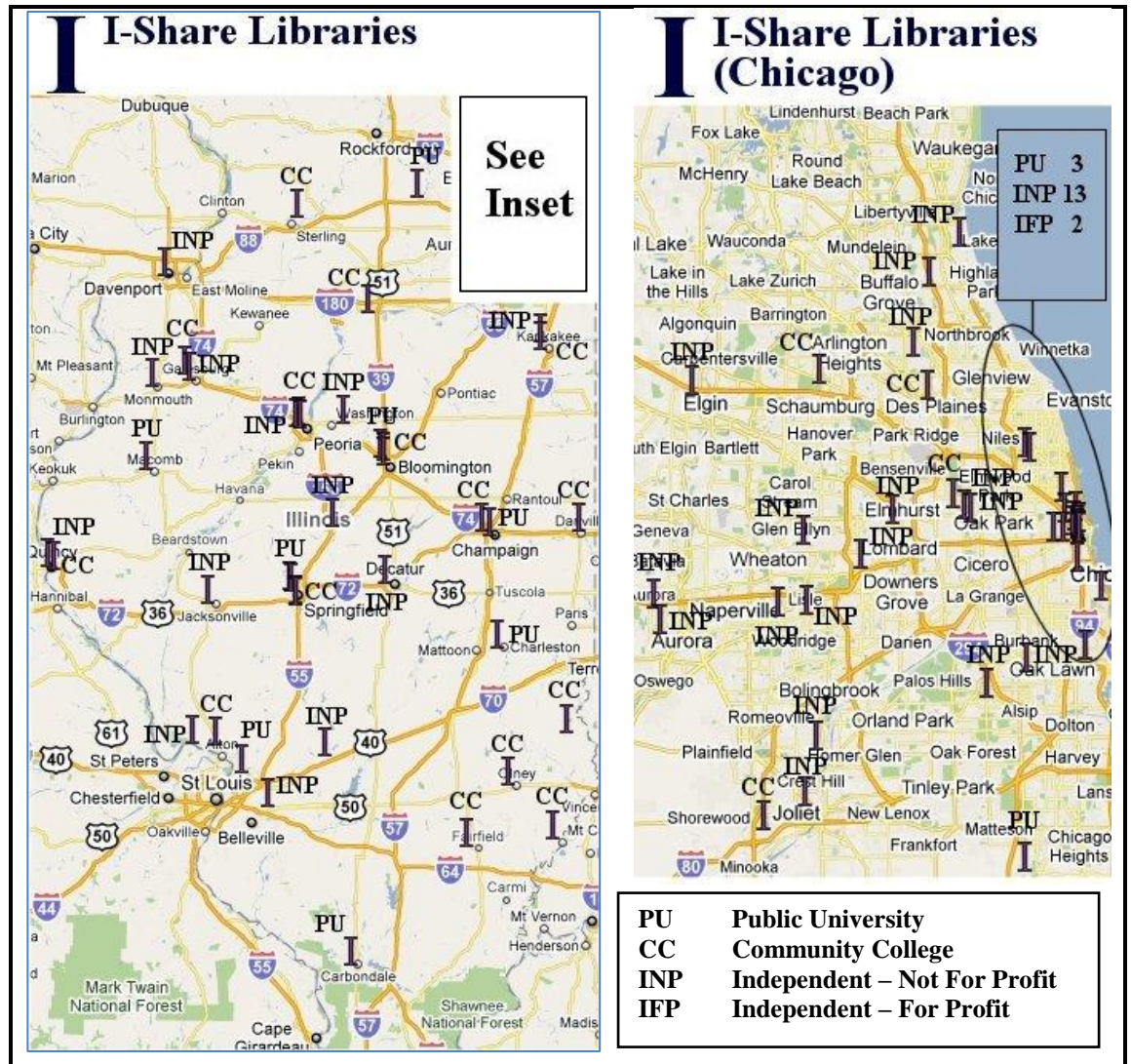
Parent Institution of Library	Integrated Library System
Loyola University Chicago	Stand Alone
MacMurray College	Stand Alone
Malcolm X College	City Colleges of Chicago
McHenry County College	Stand Alone
McKendree University	I-Share
Meadville-Lombard Theological Seminary	Stand Alone
Midstate College	Alliance Library System
Midwestern University	Stand Alone
Millikin University	I-Share
Monmouth College	I-Share
Moody Bible Institute	Stand Alone
Moraine Valley Community College	Stand Alone
Morton College	Metropolitan Library System
National University of Health Sciences	DuPage Library System
National-Louis University	I-Share
North Central College	I-Share
North Park University	I-Share
Northeastern Illinois University	I-Share
Northern Illinois University	I-Share
Northern Seminary	I-Share
Northwestern College	Stand Alone
Northwestern University	Stand Alone
Oakton Community College	I-Share
Olivet Nazarene University	I-Share
Parkland College	I-Share
Prairie State College	Metropolitan Library System
Principia College	I-Share
Quincy University	I-Share
Rasmussen College	Stand Alone
Rend Lake College	Shawnee Library System
Richard J. Daley College	City Colleges of Chicago
Richland Community College	Rolling Prairie Library System
Robert Morris University	I-Share
Rock Valley College	Stand Alone
Rockford College	Northern Illinois Cooperative
Roosevelt University	I-Share
Rosalind Franklin University of Medicine and Science	Stand Alone

Parent Institution of Library	Integrated Library System
Rush University	I-Share
Saint Anthony College of Nursing	Stand Alone
Saint Augustine College	Stand Alone
Saint Francis Medical Center College of Nursing	I-Share
Saint John's College of Nursing	Stand Alone
Saint Xavier University	I-Share
Sauk Valley Community College	I-Share
School of the Art Institute of Chicago	I-Share
Shawnee Community College	Shawnee Library System
Shimer College	Not automated
South Suburban College	Metropolitan Library System
Southeastern Illinois College	Shawnee Library System
Southern Illinois University Carbondale	I-Share
Southern Illinois University Edwardsville	I-Share
Southern Illinois University School of Medicine	I-Share
Southern Illinois University-School of Law	Stand Alone
Southwestern Illinois College	Shawnee Library System
Spertus Institute of Jewish Studies	Stand Alone
Spoon River College	Alliance Library System
Springfield College in Illinois	I-Share
Taylor Business Institute	Stand Alone
Trinity Christian College	I-Share
Trinity College of Nursing	Prairie Area Library System
Trinity International University	I-Share
Triton College	I-Share
United Library	Stand Alone
University of Chicago	I-Share
University of Illinois at Chicago	I-Share
University of Illinois at Springfield	I-Share
University of Illinois at Urbana-Champaign	I-Share
University of Saint Francis	I-Share
University of Saint Mary of the Lake Mundelein Seminary	Stand Alone
VanderCook College of Music	Stand Alone
Waubonsee Community College	Stand Alone
Western Illinois University	I-Share
Wheaton College	I-Share
Wilbur Wright College	City Colleges of Chicago

Parent Institution of Library	Integrated Library System
William Rainey Harper College	I-Share

Appendix D: Maps of CARLI and I-Share Libraries





Appendix E: IRB Approval Letter



November 19, 2010

Dennis Krieb
Department of Educational Administration

Brent Cejda
Department of Educational Administration
129 TEAC, UNL, 68588-0360

IRB Number: 20101111328 EX

Project ID: 11328

Project Title: Academic Library Directors' Perceptions of Joining a Large Library Consortium
Sharing an Integrated Library System: A Descriptive Survey

Dear Dennis:

This letter is to officially notify you of the approval of your project by the Institutional Review Board (IRB) for the Protection of Human Subjects. It is the Board's opinion that you have provided adequate safeguards for the rights and welfare of the participants in this study based on the information provided. Your proposal is in compliance with this institution's Federal Wide Assurance 00002258 and the DHHS Regulations for the Protection of Human Subjects (45 CFR 46) and has been classified as Exempt Category 2.

You are authorized to implement this study as of the Date of Final Approval: 11/19/2010. This approval is Valid Until: 05/01/2011.

1. Please include the IRB approval number (IRB# 20101111328 EX) in email consent messages to participants. Please email a copy of these messages with the number included to irb@unl.edu for our records. If you need to make changes to the message please submit the revised message to the IRB for review and approval prior to using it.

We wish to remind you that the principal investigator is responsible for reporting to this Board

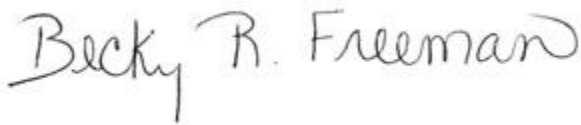
any of the following events within 48 hours of the event:

- * Any serious event (including on-site and off-site adverse events, injuries, side effects, deaths, or other problems) which in the opinion of the local investigator was unanticipated, involved risk to subjects or others, and was possibly related to the research procedures;
- * Any serious accidental or unintentional change to the IRB-approved protocol that involves risk or has the potential to recur;
- * Any publication in the literature, safety monitoring report, interim result or other finding that indicates an unexpected change to the risk/benefit ratio of the research;
- * Any breach in confidentiality or compromise in data privacy related to the subject or others; or
- * Any complaint of a subject that indicates an unanticipated risk or that cannot be resolved by the research staff.

This project should be conducted in full accordance with all applicable sections of the IRB Guidelines and you should notify the IRB immediately of any proposed changes that may affect the exempt status of your research project. You should report any unanticipated problems involving risks to the participants or others to the Board.

If you have any questions, please contact the IRB office at 472-6965.

Sincerely,



Becky R. Freeman, CIP
for the IRB



Appendix F: Informed Consent Letter

Dear Fellow CARLI Director:

My name is Dennis Krieb and I currently serve as the director of Reid Library at Lewis & Clark Community College in Godfrey, Illinois. I am also a doctoral student at the University of Nebraska – Lincoln working on my dissertation. It is for this reason that I write.

Attached to this letter is a link to a short survey comprised primarily of closed-ended questions. This survey should take only five to ten minutes to complete. The purpose of this survey is to gather CARLI library directors' perceptions about joining the I-Share service program. The results of this survey will be presented in my dissertation and possibly used for professional publications or conferences. This project is only being done for research.

This survey does not ask for any personal information that could identify the participant or the participant's library. All results will be aggregated and summarized to ensure anonymity and confidentiality. Participation in this survey is strictly voluntary and there is no compensation for taking this survey.

By clicking on the link below and completing this survey you indicate your desire to participate in this study. There are no known risks involved with participating and you may choose not to participate without adversely affecting your relationship with the investigator or the University of Nebraska.

Please feel free to call me (618)468-4310 or my advisor Dr. Brent Cejda (402) 472-0989 if you have any questions. You may also call the University of Nebraska Institutional Review Board (IRB# 20101111328 EX) about your rights as a participant in this survey at (402) 472-6965.

Your thoughts are invaluable to me and I thank you in advance for sharing.

I have read the informed consent and I agree to participate. Please click the link below to take the survey.

<http://www.surveymonkey.com/s/CARLI>

Sincerely,

Dennis Krieb

Appendix G: Survey Instrument

Survey of CARLI Directors**1. Library Profile**

* **1. Please indicate the institution type of your school as designated by the Illinois Board of Higher Education (IBHE).**

- ☐ Public University
- ☐ Community College
- ☐ Independent – Not For Profit
- ☐ Indi
- ☐ Oth...

2. Please indicate the Carnegie Classification that best represents the size of your institution.

- ☐ Very small two-year (VS2): Fewer than 500 FTEs attend this two-year institution.
- ☐ Small two-year (S2): At least 500 but fewer than 2000 FTEs attend this two-year institution.
- ☐ Medium two-year (M2): At least 2000 but fewer than 5000 FTEs attend this two-year institution.
- ☐ Large two-year (L2): At least 5000 but fewer than 10000 FTEs attend this two-year institution.
- ☐ Very large two-year (VL2): 10000 or more FTEs attend this two-year institution.
- ☐ Very small four-year (VS4): Fewer than 1000 FTEs attend this four-year institution.
- ☐ Small four-year (S4): At least 1000 but fewer than 3000 FTEs attend this four-year institution.
- ☐ Medium four-year (M4): At least 3000 but fewer than 10000 FTEs attend this four-year institution.
- ☐ Large four-year (L4): More than 10000 FTEs attend this four-year institution.

* **3. Please indicate if your library is currently an I-Share member.**

- ☐ I-Share Member
- ☐ Not an I-Share Member

Survey of CARLI Directors**2. Library Profile**

1. Please indicate how long your library has been an I-Share participant. Include any years as an ILCSO participant in your answer.

- ☐ 1 – 5 years
- ☐ 6 – 10 years
- ☐ 11 – 15 years
- ☐ 16 – 20 years
- ☐ Over 20 years

Survey of CARLI Directors**3. Library Profile**

1. If not an I-Share participant, does your library plan to join in the next enrollment period?

- ☐ Yes
- ☐ No
- ☐ Undecided

Survey of CARLI Directors**4. Respondent Profile****1. Please indicate your age.**

- ☐ 20-29 years
- ☐ 30-39 years
- ☐ 40-49 years
- ☐ 50-59 years
- ☐ 60-69 years
- ☐ 70+ years

2. Please indicate your gender.

- ☐ Male
- ☐ Female

3. Please indicate the selection that best represents your race.

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ White
- ☐ Other (please specify)

4. Please indicate the selection that best represents your academic training.

- ☐ Baccalaureate degree only
- ☐ Master's degree (library science-related)
- ☐ Master's degree (non library science)
- ☐ Master's degree (library science-related) plus a Master's degree (non library science)
- ☐ Master's degree (library science-related) plus a Doctorate degree
- ☐ Master's degree (non library science) plus a Doctorate degree
- ☐ Other

Survey of CARLI Directors

5. Benefits of I-Share Participation

The following list represents possible benefits of I-Share participation. Please indicate the level of importance each benefit represents for your library.

1. The I-Share benefit of access to a large, academically-focused collection.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. The I-Share benefit of patron-initiated borrowing through the I-Share catalog.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. The I-Share benefit of onsite reciprocal borrowing at other I-Share libraries.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. The I-Share benefit to coordinate collection development with other I-Share libraries.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. The I-Share benefit of the integrated library system being managed by CARLI staff.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. The I-Share benefit of technical support and training for integrated library system modules.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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7. The I-Share benefit to freely import bibliographic records from other I-Share libraries.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. The I-Share benefit to collaborate with other I-Share libraries.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. The I-Share benefit to participate in I-Share committees and task forces.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. The I-Share benefit to participate in the Lanter delivery system.

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. How would you rate the importance of these benefits in your decision to join I-Share?

Not Important	Slightly Important	Somewhat Important	Important	Very Important
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. Please share any comments about the benefits of I-Share participation for your library.

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6. Disadvantages of I-Share Participation

The following list represents possible disadvantages of I-Share participation. Please indicate your level of agreement with each statement as it applies to your library.

1. A disadvantage of I-Share participation is sharing an integrated library system with other libraries.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. A disadvantage of I-Share participation is complying with I-Share cataloging standards and best practices.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. A disadvantage of I-Share participation is complying with I-Share resource sharing policies.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. A disadvantage of I-Share participation is complying with I-Share standards for managing patron data.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. A disadvantage of I-Share participation is increased lending of local collections.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. A disadvantage of I-Share participation is the need to change library workflows.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. A disadvantage of I-Share participation is less contact with other consortia and library systems.

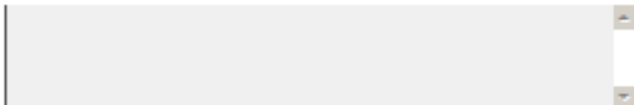
Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Have these disadvantages influenced your decision to join I-Share?

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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9. Please share any comments about the disadvantages of I-Share participation for your library.



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7. Obstacles to I-Share Participation

The following list represents possible obstacles to participating in I-Share. Please indicate your level of agreement to each statement as it applies to your library.

1. An obstacle to I-Share participation is the infrequency of open enrollment periods.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. An obstacle to I-Share participation is the lack of communication about open enrollment periods.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. An obstacle to I-Share participation is the annual assessment fee.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. An obstacle to I-Share participation is the cost to migrate local records from a current integrated library system.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. An obstacle to I-Share participation is the I-Share standard that local bibliographic records be in MARC format.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. An obstacle to I-Share participation is complying with I-Share standards for local technology.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. An obstacle to I-Share participation is the requirement of continuing education and training for staff.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. An obstacle to I-Share participation is the expectation to actively participate in meetings and training events.

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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9. An obstacle to I-Share membership is CARLI's current governance structure.

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

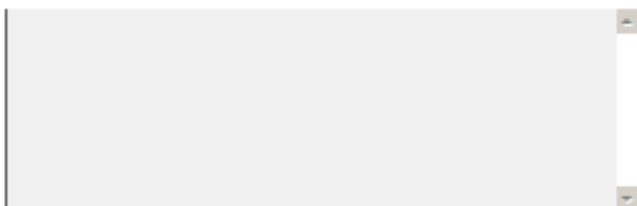
10. Have these obstacles influenced your decision to join I-Share?

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
-	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

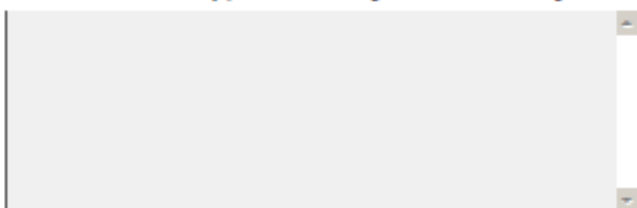
11. Please share any comments about the obstacles to participating in I-Share for your library.

Survey of CARLI Directors**8. Conclusion**

1. If you share an ILS with another consortium or library system, briefly explain why you chose this consortium or library system over I-Share.

A large, light gray rectangular text input area for question 1. It has a small upward-pointing arrow icon in the top right corner and a small downward-pointing arrow icon in the bottom right corner.

2. Assuming your immediate supervisor asked you to explain your decision about I-Share membership, how would you summarize your decision?

A large, light gray rectangular text input area for question 2. It has a small upward-pointing arrow icon in the top right corner and a small downward-pointing arrow icon in the bottom right corner.